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Infants', Toddlers', Girls' and Boys' Wear

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Market Research Division
Fairchild Publications, New York

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Infants', Toddlers', Girls' and Boys' Wear

FAIRCHILD FACT FILE

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E.B. Gold, Manager
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INFANTS', TODDLERS', GIRLS' & BOYS' WEAR

Market Trends

After a rather lackluster year in 1979, the children's wear industry (infants', toddlers' and girls' wear) and the boys' wear industry showed a "respectable" gain in dollar volume in 1980, although unit demand remained about the same as the previous year.

In 1981, spring and fall orders for children's and boys' wear came in at a much brisker pace than 1980 and producers are confident of an excellent year. Industry sources indicate that 1981 dollar volume is running between 10% and 15% higher than that of 1980. Initial commitments and reorders, according to these same sources, are earlier this year so that retail outlets may reduce their end of season markdowns by selling out their stock at an earlier date.

Retailers seem to be favoring sportswear separates, particularly plain pocketed jeans, with their "back-to-school" open-to-buy for the 1981 season, at recent trade shows. This strategy is in line with recent consumer trends towards higher quality, multi-purpose garments for children.

Like the rest of the U.S. apparel industry, U.S. manufacturers of children's and boys' wear are faced with increasingly high-quality imports from the Far East and most recently Europe. The exact extent of overseas penetration into the domestic children's market is difficult to determine since figures are included with men's and women's wear import data. American producers, however, still have the advantage of their ability not only to create but to respond quickly to fashion trends.

One of the major factors for the revitalization of this industry is the increasing birthrate the U.S. has been experiencing since 1976. This, coupled with the increase in the population of women in the childbearing ages, has led to a corresponding jump in the number of children in this country. This trend toward an increasing number of births is expected to continue, according to the U.S. Bureau of the Census, through 1985 unless there is an offsetting decline in the birthrate.

The large general merchandise store chains are continuing to capture an increasing share of the children's wear market. A recent study in Chain Store Age (April 1981) concludes that this is due to the price consciousness of the markets' consumers'. Discount stores have been increasing their share of this highly profitable market by building on their image of budget clothing for children. However, many traditional department stores are stepping-up their efforts to capture the upscale children's wear business.

GENERAL STATISTICS ON THE INDUSTRY

According to the 1981 Industrial Outlook, published by the U.S. Department of Commerce, shipments in the Children's Outerwear Industry (SIC 236), including dresses, blouses, coats, and other outerwear were an estimated $1.9 billion in 1980 gaining 6.8% over the 1978 total. In the children's dress and blouse segment (SIC 2361), shipments in 1980 showed an estimated gain of 8.6% over 1978, reaching $509 million. The remaining value of shipments, $1.4 billion, was accounted for children's coats, suits and other outerwear (SIC's 2363 and 2369).

Census of Manufactures, 1977 data, published by the Census Bureau and the latest source of industry statistics, indicate a total of 870 companies in the industry, a decline of 9.8% from the 1972 total of 964.

Data for industry classifications separately reported on by the U.S. Bureau of the Census, based on the annual survey of manufactures for 1978 and the Census of Manufactures 1972 and 1977 are shown on the following tables. Boys' wear manufacturers are not separately classified in an industry group by the Census Bureau but are included with manufacturers of men's wear.

Children's Dresses & Blouses (SIC 2361*)

	1978	1977	1972	% Change 1977/1972
Number of companies	na	455	439	+ 3.6%
Number of establishments, total**	na	519	490	+ 5.9
Number with 20 or more employees	na	374	353	+ 5.9
Employees, total (thous.)	35.5	35.2	35.4	- 0.6
Production workers (thous.)	30.8	30.4	31.0	- 2.0
Payroll (mil. $)	$248.4	$228.4	$174.4	+31.0
Value added by manufacture# (mil. $)	476.5	444.6	335.8	+32.4
Value of shipments## (mil. $)	896.0	824.7	655.2	+25.9
Capital expenditures, new (mil. $)	0.8	6.4	12.9	-50.4

Children's Coats & Suits (SIC 2363*)

	1978	1977	1972	% Change 1977/1972
Number of companies	na	108	155	-30.4
Number of establishments, total**	na	120	165	-27.3
Number with 20 or more employees	na	70	105	-33.4
Employees, total (thous.)	6.4	6.7	9.2	-27.2
Production workers (thous.)	5.7	5.7	8.1	-29.6
Payroll (mil. $)	$ 46.5	$ 45.8	$ 48.5	- 5.6
Value added by manufacture# (mil. $)	91.5	90.2	90.4	- 0.3
Value of shipments## (mil. $)	178.0	173.8	188.5	- 7.8
Capital expenditures, new (mil. $)	0.8	1.3	0.8	+62.5

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Children's Other Outerwear (SIC 2369*)

	1978	1977	1972	% Change 1977/1972
Number of companies	na	307	370	-17.1
Number of establishments, total**	na	363	406	-10.6
Number with 20 or more employees	na	242	265	- 8.7
Employees, total (thous.)	32.5	29.3	30.1	- 2.7
Production workers (thous.)	28.3	25.1	26.8	- 6.3
Payroll (mil. $)	$211.5	$184.9	$144.6	+27.9
Value added by manufacture# (mil. $)	436.4	344.4	282.9	+21.7
Value of shipments## (mil. $)	794.6	718.8	578.2	+24.3
Capital expenditures, new (mil. $)	5.7	6.7	6.1	+ 9.8

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, shown below:

SIC 2361 comprises establishments primarily engaged in manufacturing girls', children's and infants' dresses, blouses, waists, and shirts, cut and sewed from purchased woven or knit fabric.

SIC 2363 covers establishments primarily engaged in manufacturing girls', children's and infants' coats and suits, cut and sewed from woven and knit fabric.

SIC 2369 includes establishments primarily engaged in manufacturing girls', children's and infants' outerwear, not elsewhere classified, cut and sewed from purchased woven or knit fabric. It covers items such as tops, playwear, swimwear, robes, skirts, headwear, neckwear, etc.

NOTE: Separate industry figures are not available on boys' wear and on children's underwear and nightwear manufacturers, but are combined in industry data on men's and boys' manufacturers and women's and children's manufacturers, which are covered in other Fact Files covering specific apparel categories.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of total shipments, including manufacturers classified in these industries as well as secondary producers, is covered on page 33.

na = not available.
(e) = estimated.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977 and
Annual Survey of Manufactures, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Employment and Earnings

Current information on employment in segments of the children's wear industry is published by the Department of Labor, Bureau of Labor Statistics. Production worker employment in children's outerwear averaged 53,900 workers in 1980, down 4.3% from 56,300 in 1979. The Bureau of Labor Statistics reported 63,200 people employed in the children's outerwear segment of the industry. This figure is down 3.2% from the total of the previous year.

In girls' dresses and blouses, production worker employment averaged 22,500 workers in 1980 against 24,000 workers in 1979. This is a reduction of 6.3%. Total employment in this area for 1980 stood at 25,000, 6.4% lower than the figure reported in 1979.

Employment & Earnings in the Children's Outerwear, Dress & Blouse Industries
(Annual Averages)

	1980	1979	% Change 1980/1979
Children's outerwear:			
All employees (thous.)	63.2	65.3	- 3.2%
Production workers (thous.)	53.9	56.3	- 4.3
Average weekly earnings	$151.20	$137.86	+ 9.7
Average weekly hours	36.0	35.9	+ 0.3
Average overtime hours	1.2	1.2	--
Dresses & blouses:			
All employees (thous.)	25.0	26.7	- 6.4%
Production workers (thous.)	22.5	24.0	- 6.3
Average weekly earnings	$146.91	$136.06	+ 8.0
Average weekly hours	35.4	35.9	- 1.4
Average overtime hours	0.9	1.2	- 25.0

Source: U.S. Bureau of Labor Statistics, Employment and Earnings, March issues, 1980 & 1981.

Concentration in the Industry

Although the total number of plants in the children's wear industry declined by 5.6% to 1,002 establishments, between 1972 and 1977, those which manufacture dresses and blouses did register an increase of nearly 6% to 519 units during the same period. This increase was countered by a 27.3% decrease in coat and suit plants and a 10.6% decline in children's outerwear factories, to 120 and 363 units, respectively.

Based on information gleaned from the Census Bureau, 31.5% of children's apparel plants employ less than 20 persons per plant. Chief among these are plants producing children's dresses and blouses. These plants represent 14.5% of the total. This segment also leads the children's wear industry in total employment with a 64.7% representation while accounting for 51.8% of the industries plants.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry (continued)

Better than one out of three of the plants in the children's wear industry employ 100 or more people. In the largest segment of the industry (dresses and blouses) 34.7% of the plants have 100 or more employees. In outerwear (other than coats and suits), better than 38% of the plants have 100 or more workers.

The Children's Apparel Industry By Employment Size, 1977

	Establishments		Employees		Annual Payroll	
	Number	%	Number	%	Mil.$	%
Dresses & blouses (SIC 2361*), total	519	100.0%	35,200	100.0%	228.4	100.0%
By establishment size:						
Under 20 employees	145	27.9	12,000	34.1	8.7	3.8
20 - 49	169	32.5	5,700	16.2	36.6	16.0
50 - 99	111	21.4	7,900	22.4	54.8	24.0
100 - 249	67	12.9	10,100	28.7	64.8	28.4
250 or more	27	5.2	10,400	29.5	63.6	27.8
Coats & suits (SIC 2363*), total	120	100.0	6,700	100.0	45.8	100.0
By establishment size:						
Under 20 employees	50	41.7	400	6.0	3.7	8.1
20 - 49	30	25.0	1,000	14.9	7.0	15.3
50 - 99	22	18.3	1,500	22.4	10.0	21.8
100 - 249	14	11.7	2,100	31.3	13.7	29.9
250 or more	4	3.3	1,700	25.4	11.4	24.9
Other outerwear (SIC 2369*), total	363	100.0	29,300	100.0	184.9	100.0
By establishment size:						
Under 20 employees	121	33.3	900	3.1	6.2	3.4
20 - 49	90	24.8	3,000	10.2	19.5	10.5
50 - 99	57	15.7	3,900	13.3	27.6	14.9
100 - 249	71	19.6	11,300	38.6	70.0	37.9
250 or more	6	1.7	4,400	15.0	28.0	15.1

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made. See explanation of individual SIC numbers on page 3.

Source: U.S. Department of Commerce,
Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC-77-1-23-B.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment & Share of Shipments of Children's Wear in Large Plants, 1977-1979

	Number of Plants		% of Total Shipments
	With 20+ Employees	With 100+ Employees	Accounted for by Plants With 100+ Employees
Children's dresses & blouses (SIC 2361*)			
1980	252	96	72%
1979	276	96	68
1978	270	98	70
1977	243	92	69
Children's coats & suits (SIC 2363*)			
1980	59	20	67%
1979	73	24	65
1978	72	23	65
1977	64	22	69
Children's outerwear, n.e.c. (SIC 2369*)			
1980	242	101	78%
1979	262	102	74
1978	257	96	74
1977	241	100	77

n.e.c. = not elsewhere classified

* For definitions of SIC numbers, see page 3.

Source: Sales & Marketing Management, "Survey of Industrial Buying Power," 1978, 1979, 1980 & 1981 editions. (All rights reserved.)

Operating Ratios

Key Business Ratios in the Children's Wear Industry, 1980
(Median Results)

	Children's Dresses & Blouses (SIC 2361*)	Children's Coats & Suits (SIC 2363*)	Children's Outerwear, n.e.c. (SIC 2369*)
Number of manufacturing firms reporting	81	23	59
Current assets to current debt (times)	1.89	1.74	1.88
Net profits on net sales (percent)	2.71	2.84	2.66
Net profits on net worth (percent)	17.40	20.06	17.98
Net sales to net worth (times)	5.91	6.65	6.58
Net sales to net working capital (times)	6.96	7.71	6.79
Average collection period (days)	51	43	28
Net sales to inventory (times)	6.8	8.0	9.6

*For definitions of SIC numbers, see page 3.

Source: Dun & Bradstreet, Inc., Business Economics Division, 1980 Key Business Ratios, (All rights reserved.)

GENERAL STATISTICS ON THE INDUSTRY

By Region

New York State accounted for the major share of plants in 1977 with 32.0% of the total, followed closely by Pennsylvania and New Jersey which represented 12.0% and 11.1%, respectively. Combined, these three states contained 462 of the industries 1,002 plants.

Not coincidentally, the leading states in employment were also New York, Pennsylvania and New Jersey, accounting for nearly 34% of the industries 71.2 thousand employees.

Children's Wear Industry
By Geographic Region and Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or More Employees	Thousands	% of Total**
Children's dresses & blouses (SIC 2361*)				
Total U.S.	519	374	35.2	100.0%
Middle Atlantic				
New York	154	91	5.6	15.9
New Jersey	56	41	2.3	6.5
Pennsylvania	79	65	5.6	15.9
South Atlantic				
North Carolina	35	34	3.3	9.4
Georgia	8	6	0.4	1.1
Florida	22	14	0.8	2.3
West South Central				
Texas	20	16	2.2	6.3
Pacific				
California	35	20	1.8	5.1
Children's coats & suits, (SIC 2363*)				
Total U.S.	120	70	6.7	100.0%
Middle Atlantic				
New York	46	19	1.3	19.4
New Jersey	27	13	0.9	13.4
Pennsylvania	10	8	0.7	10.4
South Atlantic				
North Carolina	6	4	0.5	7.5
Georgia	5	5	0.3	4.5
Children's outerwear, n.e.c. (SIC 2369*)				
Total U.S.	363	242	29.3	100.0%
New England				
Massachusetts	16	9	1.0	3.4

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Children's Wear Industry
By Geographic Region and Leading States, 1977
(continued)

	Number of Establishments		Employees	
	Total	20 or More Employees	Thousands	% of Total**
Children's outerwear, n.e.c. (SIC 2369*) (continued)				
Middle Atlantic				
New York	121	59	4.0	13.7%
New Jersey	28	17	1.4	4.8
Pennsylvania	31	28	2.2	7.5
South Atlantic				
Virginia	7	7	1.8	6.1
North Carolina	22	19	3.4	11.6
Georgia	13	13	2.2	7.5
Florida	16	11	1.0	3.4
East South Central				
Tennessee	6	5	0.9	3.1
Alabama	15	11	2.2	7.5

n.e.c. = not elsewhere classified
* For full definitions of SIC numbers, see page 3.
** Percent distribution does not equal 100.0% due to disclosures. States with disclosures are not shown.

Source: U.S. Department of Commerce, Bureau of the Census, Census of Manufactures, 1977, Industry Series.

PRODUCTION

Children's & Girls' Wear

Unit production of children's wear items covered in the Census Bureau reports totaled 1,315.6 million units in 1979, advancing 1.2% ahead of the comparable total of 1,300.4 million in 1978.

Girls' subteen and teenage shorts showed the greatest gain in production in 1979, up 35.1% to 5,496,000 units from the 4,068,000 reported in 1978. Slips, vests, undershirts and other underwear except panties also did well, swelling to 71,064,000 units from 1978's 54,468,000, a 30.5% rise.

Nightwear, as a category, bucked the trend toward higher production in 1979 by plummeting 22.6% to 71,280,000 from 92,064,000 in the previous year. The biggest loser of the group was infants' and toddlers' nightgowns which slid 26% during the period. All other categories of nightwear declined by at least 21%.

The largest groups, childrens' and infants' hosiery and diapers both showed increases in 1979 to 386,568,000 and 112,896,000, up 8.2% and 4.0% respectively. Combined these two accounted for nearly 38% of total production of children's wear, up from 35.8% in 1978.

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979

	(Thous. Units) 1979	1978	% Change 1979/1978
Dresses, total	69,804	70,080	- 0.4%
Girls', subteen & teenage girls'	27,528	27,312	+ 0.8
By construction:			
Woven fabric	16,668	16,992	- 1.9
Knit fabric	10,860	10,320	+ 5.2
By fabric:			
All cotton & chiefly cotton	9,312	9,096	+ 2.4
All man-made & chiefly man-made	17,676	17,736	- 0.3
All wool & chiefly wool All other fabric	540	480	+ 12.5
Children's dresses	26,196	28,488	- 8.0
By construction:			
Woven fabric	18,948	20,460	- 7.4
Knit fabric	5,280	5,700	- 7.4
Construction, n.s.k.	1,968	2,328	- 15.5
By fabric:			
All cotton & chiefly cotton	7,092	7,992	- 11.3
All man-made & chiefly man-made	17,184	18,180	- 5.5
Fabric, n.s.k.	1,920	2,316	- 17.1
Infants' & toddlers' dresses	16,080	14,280	+ 12.6
By construction:			
Woven fabric	11,040	9,363	+ 14.6
Knit fabric	2,064	2,016	+ 2.4
Construction, n.s.k.	2,976	2,628	+ 13.2
By fabric:			
All cotton & chiefly cotton	3,768	4,236	- 11.0
All man-made & chiefly man-made	9,636	7,032	+ 37.0
All other fabric Fabric, n.s.k.	2,676	3,012	- 11.2
Blouses (excluding knit outerwear sport shirts), total	46,272	48,228	- 4.1
Girls', subteen & teenage girls'	27,600	28,968	- 4.8
By construction:			
Woven fabric	17,088	18,096	- 5.6
Knit fabric	8,616	6,996	+ 23.1
Construction, n.s.k.	1,896	3,876	- 51.1
By fabric:			
All cotton & chiefly cotton	4,092	5,100	- 19.8
All man-made & chiefly man-made	20,208	18,648	+ 8.4
All other fabric Fabric, n.s.k.	3,300	5,220	- 36.8

(continued)

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Blouses (continued)			
Children's, infants' & toddlers'	18,672	19,260	- 3.1%
By construction:			
Woven fabric	8,436	8,064	+ 4.6
Knit fabric	10,236	11,196	- 8.6
By fabric:			
All cotton & chiefly cotton	6,300	5,160	+ 22.1
All man-made & chiefly man-made	10,956	12,840	- 14.7
All other fabric / Fabric, n.s.k.	1,416	1,260	+ 12.4
Knit outerwear sport shirts, excluding sweat shirts, total	131,820	138,120	- 4.6
Girls', subteen & teenage girls' knit outerwear sport shirts	18,408	21,048	- 12.6
All cotton & chiefly cotton	7,152	7,440	- 3.9
All man-made & chiefly man-made	11,256	13,608	- 17.3
Children's knit outerwear sport shirts	72,564	70,464	+ 3.0
All cotton & chiefly cotton	19,260	14,784	+ 30.3
All man-made & chiefly man-made	53,304	55,680	- 4.3
Infants' & toddlers' knit outerwear sport shirts	40,848	46,608	- 12.4
All cotton & chiefly cotton	8,256	9,240	- 10.7
All man-made & chiefly man-made	32,592	37,368	- 12.8
Girls', children's, infants' & toddlers' sweat shirts	na	na	na
Girls', children's & infants' sweaters, including sweater vests	11,316	13,356	- 15.3
All cotton & chiefly cotton	na	na	na
All man-made & chiefly man-made	9,300	10,428	- 10.8
All wool & chiefly wool	na	na	na
Coats, excluding coat & legging sets	4,800	4,740	+ 1.3
Girls', subteen, & teenage girls' coats	2,244	2,244	--
By construction:			
Woven fabric / Knit fabric	2,244	2,244	--
By fabric:			
All cotton & chiefly cotton	108	84	+ 28.6
All man-made & chiefly man-made	720	744	- 3.2
All wool & chiefly wool	1,416	1,416	--

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Coats (continued)			
Children's & infants' coats	2,556	2,496	+ 2.4%
By construction:			
Woven fabric / Knit fabric	2,556	2,496	+ 2.4
By fabric:			
All cotton & chiefly cotton	2,424	2,280	+ 6.3
All man-made & chiefly man-made / All wool & chiefly wool	132	216	- 38.9
Coat & legging sets, coat & snow pants sets, & ski & snow suits, total girls', children's, infants' & toddlers'	2,652	3,600	- 26.3
By construction:			
Woven fabric / Knit fabric	2,652	3,600	- 26.3
By fabric:			
All cotton & chiefly cotton	**	**	
All man-made & chiefly man-made	2,268	3,120	- 27.3
All wool & chiefly wool / All other fabric / Fabric, n.s.k.	384	480	- 20.0
Raincoats & rain capes, total—girls', children's & toddlers'	396	456	- 13.2
Jackets, total—girls', children's & infants'	6,348	6,612	- 4.0
By construction:			
Woven fabric / Knit fabric	6,348	6,612	- 4.0
By fabric:			
All cotton & chiefly cotton	264	288	- 8.3
All man-made & chiefly man-made	5,112	4,848	+ 5.4
All wool & chiefly wool / All other fabric / Fabric, n.s.k.	972	1,476	- 34.1
Vests, total—girls', children's & infants'	1,992	1,884	+ 5.7
By construction:			
Woven fabric	444	156	+184.6
Knit fabric	1,008	924	+ 9.1
Construction, n.s.k.	540	804	- 32.8
By fabric:			
All cotton & chiefly cotton	780	432	+ 80.6
All man-made & chiefly man-made	1,284	1,452	- 11.6

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Suits, total—girls', children's & infants'	5,856	5,760	+ 1.7%
By construction:			
Woven fabric	5,760	5,460	+ 5.5
Knit fabric	96	300	- 68.0
By fabric:			
All cotton & chiefly cotton	2,292	2,016	+ 13.7
All man-made & chiefly man-made	3,480	3,672	- 5.2
All other fabric	84	72	+ 16.7
Skirts, total—girls', children's & infants'	8,244	7,968	+ 3.5
By construction:			
Woven fabric	4,200	4,140	+ 1.4
Knit fabric	2,496	2,184	+ 14.3
Construction, n.s.k.	1,548	1,644	- 5.8
By fabric:			
All cotton & chiefly cotton	1,584	1,536	+ 3.1
All man-made & chiefly man-made	5,712	5,496	- 3.9
All wool & chiefly wool; Fabric, n.s.k.	948	936	+ 1.3
Slacks, including jean-cut casual slacks, total—girls', subteen & teenage girls'	16,548	18,012	- 8.1
By construction:			
Woven fabric	11,916	8,376	+ 42.3
Knit fabric	1,740	3,132	- 44.4
Construction, n.s.k.	2,892	6,504	- 55.5
By fabric:			
All cotton & chiefly cotton	3,828	2,976	+ 28.6
All man-made & chiefly man-made	10,956	9,552	+ 14.7
All wool & chiefly wool; All other fabric; Fabric, n.s.k.	1,764	5,484	- 67.8
Jeans & dungarees, total—girls', subteen & teenage girls'	10,044	10,356	- 3.0
All cotton & chiefly cotton	5,952	7,080	- 15.9
All man-made & chiefly man-made	600	576	+ 4.2
Fabric, n.s.k.	3,492	2,700	+ 29.3
Slacks, including jean-cut casual slacks, total—children's & infants'	25,188	22,056	+ 14.2
By construction:			
Woven fabric	14,256	10,356	+ 37.7
Knit fabric	5,340	6,228	- 14.3
Construction, n.s.k.	5,592	5,472	+ 2.2

(continued)

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Slacks—children's & infants' (cont'd.)			
By fabric:			
All cotton & chiefly cotton	9,096	7,332	+ 24.1%
All man-made & chiefly man-made	12,996	11,328	+ 14.7
All wool & chiefly wool; All other fabric	1,260	1,368	- 7.9
Fabric, n.s.k.	1,836	2,028	- 9.5
Jeans & dungarees, total—children's & infants'	19,284	21,480	- 10.2
All cotton & chiefly cotton	13,200	11,268	+ 17.1
All man-made & chiefly man-made	4,476	7,884	- 43.2
Fabric, n.s.k.	1,608	2,328	- 30.9
Shorts, total—girls', subteen & teenage girls'	5,496	4,068	+ 35.1
By construction:			
Woven fabric	2,748	1,332	+106.3
Knit fabric	840	900	- 6.7
Construction, n.s.k.	1,908	1,836	+ 3.9
By fabric:			
All cotton & chiefly cotton	1,884	1,152	+ 63.5
All man-made & chiefly man-made	900	1,092	- 17.6
Fabric, n.s.k.	2,712	1,824	+ 48.7
Playgarments, including playsuits & halter tops, total—girls', subteen & teenage girls'	4,488	4,428	+ 1.4
By construction:			
Woven fabric; Knit fabric	4,488	4,428	+ 1.4
By fabric:			
All cotton & chiefly cotton; All man-made & chiefly man-made	4,488	4,428	+ 1.4
Shorts, total—children's & infants'	15,132	16,488	- 8.2
By construction:			
Woven fabric	7,872	8,268	- 4.8
Knit fabric	5,412	5,964	- 9.3
Construction, n.s.k.	1,848	2,256	- 18.1
By fabric:			
All cotton & chiefly cotton	4,920	5,328	- 7.7
All man-made & chiefly man-made	8,400	9,204	- 8.7
All other fabric; Fabric, n.s.k.	1,812	1,956	- 7.4

(continued)

PRODUCTION
Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Playgarments, including playsuits & halter tops, total—children's	23,112	30,636	- 24.6%
By construction:			
Woven fabric	17,028	24,168	- 29.5
Knit fabric	4,464	4,128	+ 8.1
Construction, n.s.k.	1,620	2,340	- 30.8
By fabric:			
All cotton & chiefly cotton	15,720	19,600	- 19.8
All man-made & chiefly man-made	7,392	11,028	- 33.0
Playgarments, including creepers & rompers, total—infants' & toddlers'	64,092	67,680	- 5.3
By construction:			
Woven fabric	26,388	25,836	+ 2.1
Knit fabric	32,352	35,916	- 9.9
Construction, n.s.k.	5,352	5,928	- 9.7
By fabric:			
All cotton & chiefly cotton	18,900	19,368	- 2.4
All man-made & chiefly man-made	40,344	43,140	- 6.5
All other fabric	--	--	
Fabric, n.s.k.	4,848	5,172	- 6.3
Swimsuits, total—girls', children's, & infants'	11,244	11,232	+ 0.1
By construction:			
Woven fabric	4,560	4,380	+ 4.1
Knit fabric	6,684	6,852	- 2.5
By fabric:			
All cotton & chiefly cotton	468	504	- 7.1
All man-made & chiefly man-made	7,728	8,004	- 3.4
Fabric, n.s.k.	3,048	2,724	+ 11.9
Underwear			
Panties, including pettipants, total—girls' & children's	96,756	99,252	- 2.5
By construction:			
Woven fabric	9,864	7,752	+ 27.2
Knit fabric	86,892	83,868	+ 3.6
Construction, n.s.k.	--	7,632	na
By fabric:			
All cotton & chiefly cotton	57,156	54,912	+ 4.1
All man-made & chiefly man-made	32,616	29,040	+ 12.3
Fabric, n.s.k.	6,984	15,300	- 54.4

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Underwear (continued)			
Slips, vests, & undershirts, total—girls' & children's	26,556	22,980	+ 15.6%
By construction:			
Woven fabric	2,412	1,752	+ 37.7
Knit fabric	24,144	21,228	+ 13.7
By fabric:			
All cotton & chiefly cotton	11,412	9,864	+ 17.8
All man-made & chiefly man-made	15,144	13,296	+ 13.9
Panties, total—infants' & toddlers'	73,500	66,792	+ 10.0
By construction:			
Woven fabric	2,076	1,176	+ 76.5
Knit fabric	71,424	61,080	+ 16.9
Construction, n.s.k.	--	4,356	na
By fabric:			
All cotton & chiefly cotton	58,884	49,380	+ 19.2
All man-made & chiefly man-made	14,916	17,412	- 14.3
Slips, vests, undershirts & other underwear except panties, total—infants' & toddlers'	71,064	54,468	+ 30.5
By construction:			
Woven fabric	240	264	- 9.1
Knit fabric	68,256	48,048	+ 42.1
Construction, n.s.k.	2,568	6,156	- 58.3
By fabric:			
All cotton & chiefly cotton	51,180	45,192	+ 13.3
All man-made & chiefly man-made	7,092	3,120	+127.3
Fabric, n.s.k.	12,792	5,156	+148.1
Nightwear			
Nightwear, excluding robes, total—girls', children's, infants' & toddlers'	71,280	92,064	- 22.6
Nightgowns, total—girls' & children's	11,208	14,280	- 21.5
By construction:			
Woven fabric	4,284	6,312	- 32.1
Knit fabric	6,924	7,968	- 13.1
By fabric:			
All cotton & chiefly cotton	3,564	4,284	- 16.8
All man-made & chiefly man-made	7,644	9,996	- 23.5

(continued)

PRODUCTION
Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Nightwear (continued)			
Pajamas including heavyweight sleeping garments made with feet, total—girls' & children's	16,788	21,504	- 21.9%
By construction:			
Woven fabric	2,064	7,212	- 71.4
Knit fabric	14,724	14,292	+ 3.0
By fabric:			
All cotton & chiefly cotton	1,236	1,044	+ 18.4
All man-made & chiefly man-made	13,812	18,528	- 25.4
All other fabric			
Fabric, n.s.k.	1,740	1,932	- 9.9
Nightgowns, total—infants' & toddlers'	11,256	15,204	- 26.0
By construction:			
Woven fabric	1,620	1,668	- 2.9
Knit fabric	9,636	13,536	- 28.8
By fabric:			
All cotton & chiefly cotton	360	2,496	- 85.6
All man-made & chiefly man-made	8,544	11,304	- 24.4
Fabric, n.s.k.	732	1,404	- 47.9
Pajamas including heavyweight sleeping garments made with feet, total—infants' & toddlers'	32,028	41,076	- 22.0%
By construction:			
Woven fabric	1,632	1,716	- 4.9
Knit fabric	29,532	37,860	- 22.0
Construction, n.s.k.	864	1,500	- 42.4
By fabric:			
All cotton & chiefly cotton	2,196	2,412	- 9.0
All man-made & chiefly man-made	23,052	30,852	- 25.3
All other fabric	2,364	1,560	+ 51.5
Fabric, n.s.k.	4,416	6,252	- 29.4
Robes, total—girls', children's & infants'	4,152	5,160	- 19.5

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Diapers			
Diapers, total	112,896	108,600	+ 4.0%
Bird's-eye	52,836	50,928	+ 3.7
Gauze	60,060	57,672	+ 4.1
Hosiery			
Hosiery, total—children's & infants'	386,568	357,204	+ 8.2
Footsocks	11,196	4,116	+172.0
Anklets	264,732	265,692	- 0.4
Knee-highs	101,652	77,376	+ 31.4
Waist-high	8,988	10,020	- 10.3

n.s.k. = not specified by kind
na = not available
**Included in all other fabric to avoid disclosing figures for individual companies.

Sources: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel, MA-23A-(79)-1.

National Association of Hosiery
Manufacturers, 1979 Hosiery Statistics.

National Cotton Council of America,
Cotton Counts Its Customers 1979.

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)

	Percent	
	1979	1978
Girls', subteen & teenage girls' coats, total	100.0%	100.0%
By fabric:		
All wool & chiefly wool	63.1	63.1
Other fabric	36.9	36.9
Children's & infants' coats, total	100.0%	100.0%
By fabric:		
All wool & chiefly wool	5.2	8.7
Other fabric	94.8	91.3
Girls', subteen & teenage girls' dresses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	33.8	33.3
All wool & chiefly wool & other fabrics	2.0	1.8
All man-made & chiefly man-made	64.2	64.9
By construction:		
Knit fabric	39.5	37.8
Woven fabric	60.5	62.2
Children's dresses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	27.1	28.1
All man-made & chiefly man-made	65.6	63.8
Fabric, n.s.k.	7.3	8.1
By construction:		
Knit fabric	20.2	20.0
Woven fabric	72.3	71.8
Construction, n.s.k.	7.5	8.2
Infants' & toddlers' dresses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	23.4	29.7
All man-made & chiefly man-made	59.9	49.2
Fabric, n.s.k.	16.6	21.1
Girls', subteen & teenage girls' blouses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	14.8	17.6
Other fabric & fabric, n.s.k.	85.2	82.4
Children's, infants' and toddlers' blouses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	33.7	26.8
Other fabric	66.3	73.2

(continued)

Production of Children's & Girls' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)
(continued)

	Percent	
	1979	1978
Girls', children's & infants' skirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	19.2	19.3
All wool & chiefly wool	11.5	11.7
All man-made & chiefly man-made	69.3	69.0
Girls', subteen & teenage girls' slacks, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	23.1	16.5
Other fabric	76.9	84.5
Children's slacks & shorts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	36.1	33.2
Other fabric	56.6	57.6
Fabric, n.s.k.	7.3	9.2
Girls', subteen & teenage girls' knit outerwear shirts, excluding sweat shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	38.8	35.3
All man-made & chiefly man-made	61.2	64.7
Children's knit sport shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	26.5	21.0
All man-made & chiefly man-made	73.5	79.0
Infants' & toddlers' knit shirts, excluding sweat shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	20.2	20.5
All man-made & chiefly man-made	79.8	79.5
Children's play garments, including playsuits & halter tops, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	68.0	64.0
Other fabric	32.0	36.0
Girls', children's & infants' swimsuits, total	100.0%	100.0%
By Construction:		
Knit fabric	40.6	39.0
Woven fabric	59.4	61.0

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction--1978, 1979
(Percent Distribution)
(continued)

	Percent	
	1979	1978
Innerwear, Nightwear		
Girls' & children's panties, drawers, bloomers, including pettipants, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	59.1	55.3
Other fabric	33.7	29.3
Fabric, n.s.k.	7.2	15.4
By construction:		
Knit fabric	87.5	84.5
Woven fabric & construction, n.s.k.	12.5	15.5
Infants' diapers, total	100.0%	100.0%
By fabric:		
Bird's-eye	46.8	46.9
Gauze	53.2	53.1
Girls' & children's nightgowns, total	100.0%	100.0%
By construction:		
Woven fabric	38.2	44.2
Knit fabric	61.8	55.8
Girls' & children's pajamas, total	100.0%	100.0%
By construction:		
Woven fabric	12.3	33.5
Knit fabric	87.7	66.5
Infants' & toddler's nightgowns, including kimonos, total	100.0%	100.0%
By construction:		
Woven fabric	14.4	11.0
Knit fabric	85.6	89.0
Infants' & toddlers' pajamas, total	100.0%	100.0%
By construction:		
Woven fabric	5.1	4.2
Knit fabric	92.2	92.2
Construction, n.s.k.	2.7	3.6

*Comparable figures for earlier years are not available for most items as the Census Bureau increased the number of manufacturers covered when conducting the 1977 apparel survey.

**Preliminary 1978 figures.
n.s.k. = not specified by kind.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Apparel, 1979, MA-23A(79)-1 (December 1980); For diapers, the source is: National Cotton Council of America, Cotton Counts Its Customers, (1979 Edition).

PRODUCTION

Boys' Wear

According to the U.S. Bureau of the Census, production of reported categories of boys' wear fell to 519,379,000 units in 1979, down 6.2% from the comparable figure of 553,802,000 units in 1978.

The major share of production was credited to the knit sport shirts, except sweat shirts category, which accounted for over 26% with 136,848,000 units in volume. Following this category in importance are lightweight undershirts with ¼ sleeves, excluding T-shirts made for outerwear and jeans and dungarees. These two groups accounted for 79,512 and 48,403 units in volume and 15.3% and 9.3% in market share, respectively.

Among the reported classifications of boys' wear, nontailored light outer jackets showed the greatest decline in output in 1979, down 32.9% to 4,884,000 units from 7,284,000 in the preceding year. Also recording large declines were casual (nontailored) sportscoats and jackets which registered a 26.3% decline to 1,586,000 units; separate dress and sport trousers at 20,962,000, a 23.8% dip and nontailored heavy outer jackets, except ski, a 19.9% slide to 5,112,000 units.

Even though the industry, as a whole did show a decline in production in 1979, several categories did manage to show increases. Leading these groups was separate vests, excluding sweater vests which climbed from 1,223,000 in 1978 to 1,880,000 in 1979, a 53.7% increase. Gains were also registered, although not as dramatic, by tailored suit-type dress and sport coats, up 29.3% to 1,435,000 units and pajamas and other nightwear, up 6.9% to 16,380,000.

PRODUCTION
Boys' Wear

Production of Specified Types of Boys' Wear—1978, 1979

	(Thous. Units) 1979	1978	% Change 1979/1978
Boys' Suits, Coats			
Boys' tailored suits, including uniform	4,351	4,673	- 6.9%
By fabric:			
All man-made & chiefly man-made	3,710	3,938	- 5.8
All wool & chiefly wool	196	181	+ 8.3
All other fabric	277	355	- 22.0
Fabric, n.s.k.	168	199	- 15.6
By construction:			
Woven fabric	3,377	3,603	- 6.3
Knit fabric	974	1,070	- 9.0
Boys' overcoats, topcoats & tailored suburban & car coats, including uniform	598	643	- 7.0
By fabric:			
All man-made & chiefly man-made	496	225	+120.4
All wool & chiefly wool; All other fabric	102	418	- 75.6
By construction:			
Woven fabric; Knit fabric	598	643	- 7.0
Boys' tailored suit-type dress & sport coats, including uniform	1,435	1,110	+ 29.3
By fabric:			
All cotton & chiefly cotton	213	180	+ 18.3
All man-made & chiefly man-made	785	659	+ 19.1
All wool & chiefly wool; All other fabric	437	271	+ 61.3
By construction:			
Woven fabric	1,217	913	+ 33.3
Knit fabric	218	197	+ 10.7
Boys' casual (nontailored) sport coats & jackets	1,586	2,151	- 26.3
By fabric:			
All cotton & chiefly cotton	703	na	na
All man-made & chiefly man-made	535	764	- 30.0
Fabric, n.s.k.	348	1,387	- 74.9
By construction:			
Woven fabric; Knit fabric	1,586	2,151	- 26.3

(continued)

PRODUCTION
Boys' Wear

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Boys' Vests			
Boys' separate vests, excluding sweater vests	1,880	1,223	+ 53.7%
By fabric:			
All cotton & chiefly cotton	1,261	731	+ 72.5
All man-made & chiefly man-made	595	472	+ 26.1
All wool & chiefly wool; All other fabric; Fabric, n.s.k.	24	20	+ 20.0
By construction:			
Woven fabric; Knit fabric	1,880	1,223	+ 53.7
Boys' Shirts & Sweaters			
Boys' dress shirts, including uniform	11,124	12,288	- 9.5
By fabric:			
All cotton & chiefly cotton	5,940	5,412	+ 9.8
All man-made & chiefly man-made	3,828	5,124	- 25.3
All other fabric; Fabric, n.s.k.	1,356	1,752	- 22.6
By construction:			
Woven fabric	9,696	9,516	+ 1.9
Knit fabric	708	1,536	- 53.9
Construction, n.s.k.	720	1,236	- 41.7
Boys' woven sport shirts	22,128	22,752	- 2.7
All cotton & chiefly cotton	6,792	7,404	- 8.3
All man-made & chiefly man-made	14,724	13,836	+ 6.4
All wool & chiefly wool; All other fabric; Fabric, n.s.k.	612	1,512	- 59.5
Boys' knit sport shirts, except sweat shirts	136,848	148,104	- 7.6
By fabric:			
All cotton & chiefly cotton	62,808	70,572	- 11.0
All man-made & chiefly man-made	65,076	65,160	- 0.1
All other fabric	4,680	7,176	- 34.8
Fabric, n.s.k.	4,284	5,196	- 17.6
By type:			
Full open front shirts	5,808	9,036	- 35.7
Partial front opening	41,052	41,136	- 0.2
T-shirts made for outerwear, including tanktops	73,440	80,424	- 8.7
Type, n.s.k.	16,548	17,508	- 5.5

(continued)

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Boys' sweaters, including sweater vests, knit cardigans & pullovers	6,384	7,272	- 12.7%
All man-made & chiefly man-made	5,100	6,144	- 17.0
All wool & chiefly wool	960	912	+ 5.3
All other fiber / Fiber, n.s.k.	324	216	+ 50.0
Boys' Trousers, Jeans & Jean-Cut Casual Slacks			
Boys' separate dress & sport trousers, including uniform	20,962	27,492	- 23.8%
Woven fabric:			
All cotton & chiefly cotton	8,529	12,168	- 29.9
All man-made & chiefly man-made	10,428	12,947	- 19.5
All wool & chiefly wool / All other fabric	287	289	- 0.7
Knit fabric:			
All cotton & chiefly cotton / All man-made & chiefly man-made	1,718	2,088	- 17.7
Boys' jeans & dungarees	48,403	49,242	- 1.7
All cotton & chiefly cotton	41,496	42,518	- 2.4
All man-made & chiefly man-made	6,907	6,724	+ 2.7
Boys' jean-cut casual slacks	26,553	31,615	- 16.0
All cotton & chiefly cotton	21,857	23,697	- 7.8
All man-made & chiefly man-made	4,696	7,918	- 40.7
Boys' shorts, except athletic shorts	5,845	8,993	- 35.0
By fabric:			
All cotton & chiefly cotton	4,935	5,859	- 15.8
All man-made & chiefly man-made	618	2,730	- 77.4
Fabric, n.s.k.	292	404	- 27.7
By construction:			
Woven fabric / Knit fabric	5,845	8,993	- 35.0
Boys' coveralls, overalls, work pants & jumpsuits	7,560	9,156	- 17.4
Boys' nontailored heavy outer jackets except ski	5,112	6,384	- 19.9
By construction:			
Woven fabric	4,872	6,168	- 21.0
Knit fabric	240	216	+ 11.1

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Boys' nontailored heavy outer jackets except ski (continued)			
By fabric:			
All cotton & chiefly cotton	840	1,920	- 56.3%
All man-made & chiefly man-made	3,576	2,808	+ 27.4
All wool & chiefly wool All other fabric	696	1,656	- 58.0
Boys' nontailored light outer jackets	4,884	7,284	- 32.9
By construction:			
Woven fabric Knit fabric	4,884	7,284	- 32.9
By fabric:			
All cotton & chiefly cotton	1,332	1,524	- 12.6
All man-made & chiefly man-made	3,192	5,376	- 40.6
All wool & chiefly wool All other fabric	360	384	- 6.3
Boys' Underwear & Nightwear			
Boys' pajamas & other nightwear, excluding robes	16,380	15,324	+ 6.9
By construction:			
Woven fabric	5,580	7,968	- 30.0
Knit fabric	10,800	7,356	+ 46.8
By fabric:			
All cotton & chiefly cotton	6,504	8,052	- 19.2
All man-made & chiefly man-made	9,876	7,272	na
All other fabric	na		
Woven boxer shorts (boys'):	1,272	1,716	- 25.9
Cotton/polyester blended fabric All cotton & all other cotton blends	1,272	1,716	- 25.9
Knit underwear:			
Boys' lightweight undershirts with ¼ sleeve, excl. T-shirts made for outerwear	79,512	82,428	- 3.5
Cotton/polyester blended fabric	40,788	39,564	+ 3.1
All cotton & all other cotton blends	37,188	41,640	- 10.7
All other fabric Fabric, n.s.k.	1,536	1,224	+ 25.5

(continued)

Boys' Wear

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Knit underwear: (continued)			
Boys' supporter-type knit briefs	116,472	113,952	+ 2.2%
Cotton/polyester blended fabric	39,108	39,696	- 1.5
All cotton & all other cotton blends	77,364	74,256	+ 4.2

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79-1).

National Association of Hosiery Manufacturers,
1979 Hosiery Statistics.

Production of Boys' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)

	Percent 1979	1978
Boys' Tailored Clothing		
Boys' suits, except wash & leisure suits, including uniform suits, total	100.0%	100.0%
By fabric:		
All wool & wool blends	4.5	3.9
Fabrics other than above	95.5	96.1
Boys' tailored suit-type dress & sport coats, including uniform, total	100.0%	100.0%
By fabric:		
All wool & wool blends	30.4	24.4
Fabrics other than above	59.6	75.6
Boys' dress & sport trousers, including uniform, total	100.0%	100.0%
By fabric:		
All wool & wool blends	1.4	1.1
All cotton & cotton blends (with other than wool)	40.7	44.3
Fabrics other than above	49.7	47.1

(continued)

Boys' Wear

Production of Boys' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)
(continued)

	Percent	
	1979	1978
Boys' Furnishings, Work Clothing, Nontailored Sportswear		
Boys' dress shirts, including uniform, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	53.3	44.0
Fabric other than above	34.4	41.7
Fabric, n.s.k.	12.2	14.3
Boys' sport shirts, except knit outerwear sport shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	30.7	32.6
All man-made & chiefly man-made	66.5	60.8
All wool & chiefly wool & fabric, n.s.k.	2.8	6.6
Boys' jean-cut casual slacks, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	82.3	75.0
Fabric other than above	17.7	25.0
Boys' nontailored heavy outer jackets, except ski, total	100.0%	100.0%
By fabric:		
All wool & wool blends	13.6	26.8
All cotton & cotton blends	16.4	31.1
Fabric other than above	70.0	45.5
Boys' nontailored light outer jackets, total	100.0%	100.0%
By fabric:		
All cotton & cotton blends	27.2	20.9
All wool & wool blends	7.3	5.3
Fabric other than above	65.3	73.8
Boys' swimsuits, total*	100.0%	100.0%
By construction:		
Knit fabric	74.1	72.6
Woven fabric	25.9	27.4
Boys' Knit Outerwear		
Boys' sweaters, knit cardigans & pullovers, total	100.0%	100.0%
By fabric:		
All wool & chiefly wool	15.0	12.5
All man-made & chiefly man-made	85.0	87.5

(continued)

Boys' Wear

Production of Boys' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)
(continued)

	Percent	
	1979	1978
Boys' Knit Outerwear (continued)		
Boys' knit outerwear sport shirts, excluding sweat shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	45.9	47.7
All man-made & chiefly man-made (nylon, acrylic, rayon, etc.)	47.6	44.0
Fabric, n.s.k.	6.5	8.3
Boys' Underwear & Nightwear		
Boys' pajamas, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	39.7	52.5
Fabric other than above	60.3	47.5
By construction:		
Woven fabric	34.1	52.0
Knit fabric	65.9	48.0
Boys' knit underwear:		
Boys' lightweight with ¼ sleeve, including T-shirt used as undershirt, total	100.0%	100.0%
By fabric:		
Cotton/polyester blends	51.2	48.0
All cotton & all other cotton blends	46.7	50.5
Fabric, n.s.k.	2.1	1.5
Boys' briefs, supporter-type, total	100.0%	100.0%
By fabric:		
Cotton/polyester blends	33.6	34.8
All cotton & all other cotton blends	66.4	65.2

n.s.k. = not specified by kind
*Boys' wear items are combined with statistics on men's wear.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Apparel, 1979 MA-23A(79)-1, (Issued December 1980).

MATERIALS CONSUMED IN PRODUCTION

The figures for the materials used in the consumption section of this report are supplied by the National Cotton Council of America. These figures may conflict with Census Bureau figures for the same items published in other sections of this Fact File.

Children's & Girls' Wear

Total Fiber Consumption in the Production of Girls', Children's & Infants' Wear—1978, 1979

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Girls', children's & infants' apparel	na	na	385,840	376,632	37%	38%
Knit	na	na	234,120	225,194	29	30
Woven	na	na	151,720	151,438	52	52
Blouses & shirts	16,363	16,445	48,681	48,881	58	59
Knit	13,908	13,756	41,795	41,338	61	61
Woven	2,455	2,689	6,886	7,543	42	42
Coats	393	405	6,610	6,810	19	21
Knit	43	45	997	1,042	8	9
Woven	350	360	5,613	5,768	21	23
Jackets	750	731	6,794	6,650	28	27
Knit	256	255	3,175	3,163	17	17
Woven	494	476	3,619	3,487	38	37
Ski & snow suits & coat-leggings sets	281	282	4,068	4,089	11	14
Knit	154	155	3,275	3,296	12	15
Woven	127	127	793	793	9	9
Dresses	5,872	5,931	34,389	34,424	31	32
Knit	1,585	1,521	13,788	13,232	18	18
Woven	4,287	4,410	20,601	21,192	42	43
Nightgowns	2,684	2,535	14,991	14,150	--	2
Knit	2,013	1,839	11,301	10,325	--	--
Woven	671	696	3,690	3,825	--	--
Pajamas	5,448	5,210	36,309	34,717	--	3
Knit	4,685	4,436	31,359	29,695	--	--
Woven	763	774	4,950	5,022	--	3
Play garments	9,928	9,733	41,043	40,211	55	56
Knit	4,368	4,224	18,976	18,349	53	54
Woven	5,560	5,509	22,067	21,862	56	57

(continued)

MATERIALS CONSUMED IN PRODUCTION

Children's & Girls' Wear

Total Fiber Consumption in the Production of Girls', Children's & Infants' Wear—1978, 1979
(continued)

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Rainwear, woven	30	29	435	421	37%	42%
Robes & housecoats	262	262	3,723	3,699	--	3
Knit	55	58	669	698	--	#
Woven	207	204	3,054	3,001	--	3
Skirts	583	561	4,044	3,900	35	34
Knit	99	112	721	817	13	13
Woven	484	449	3,323	3,083	40	40
Slacks	4,973	4,875	27,567	27,001	40	41
Knit	2,039	2,027	10,422	10,360	17	21
Woven	2,934	2,848	17,145	16,641	56	56
Dungarees & jeans, woven	2,769	2,637	25,544	24,327	80	82
Suits, excl. ski & snow	444	493	5,591	6,206	39	42
Knit	35	39	363	405	15	17
Woven	409	454	5,228	5,801	41	44
Sweaters & jerseys, knit	1,049	1,071	5,672	5,791	8	9
Swim suits	1,037	978	4,541	4,260	17	19
Knit	653	600	3,199	2,939	6	7
Woven	384	378	1,342	1,321	49	52
Underwear	21,578	20,853	24,782	24,005	61	62
Knit	20,112	19,444	23,212	22,483	62	63
Woven	1,466	1,409	1,570	1,522	53	54

(e) = estimated
(r) = revised
na = not available
# = Less than 0.5%
*Percentage of total material consumption accounted for by cotton at the raw fiber (bale) level. "Percent Cotton" in this table represents a weighted calculation involving (1) 100% cotton materials, plus (2) cotton content of blends and mixtures.

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

MATERIALS CONSUMED IN PRODUCTION

Boys' Wear

Total Fiber Consumption in the Production of Boys' Wear—1978, 1979

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Boys' apparel, total	na	na	280,138	257,261	45%	47%
Knit	na	na	109,652	112,789	42	44
Woven	na	na	170,486	114,472	47	62
Athletic shorts & uniforms						
Woven shorts	1,071	1,179	4,199	4,622	42	48
Coats & jackets, excl. leather, total	1,573	1,585	18,275	18,466	--	--
Overcoats & topcoats, total	49	52	1,349	1,427	21	25
Knit	7	8	150	171	--	--
Woven	42	44	1,199	1,256	25	29
Dress & sports coats, total	304	301	3,218	3,194	12	14
Knit	106	114	1,179	1,268	--	--
Woven	198	187	2,039	1,926	22	24
Heavyweight jackets, total	532	537	7,479	7,549	33	33
Knit	27	27	443	443	--	--
Woven	505	510	7,036	7,106	35	35
Lightweight jackets, total	688	695	6,229	6,296	13	15
Knit	344	354	3,231	3,325	--	--
Woven	344	341	2,998	2,971	26	31
Pajamas & other nightwear, total	1,184	1,246	14,671	14,532	2	3
Knit	533	539	8,273	8,366	--	--
Woven	651	707	5,152	5,986	4	6
Rainwear, except plastic & rubberized						
Woven	19	19	430	430	29	29
Shirts, total	14,633	30,034	67,004	70,498	50	47
Dress & business, total	1,044	1,024	4,443	4,371	30	29
Knit	167	184	803	885	3	4
Woven	877	840	3,640	3,486	36	35

(continued)

Boys' Wear

Total Fiber Consumption in the Production of Boys' Wear -- 1978, 1979
(continued)

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Boys' apparel, total (continued)						
Shirts, total (continued)						
Sport, total	12,577	13,219	56,280	59,161	44%	48%
Knit	10,757	11,323	48,975	51,551	47	49
Woven	1,820	1,896	7,305	7,610	39	44
Sweat, knit	977	1,086	6,002	6,672	47	52
Work, woven	35	37	279	294	52	43
Suits, total	344	355	7,385	7,630	18	18
Knit	52	67	1,147	1,478	--	--
Woven	292	288	6,238	6,152	21	22
Sweaters, knit	576	606	4,320	4,545	5	6
Swimsuits, total	517	533	1,785	1,829	27	33
Knit	103	130	316	399	7	7
Woven	414	403	1,469	1,430	31	40
Trousers & shorts, total	10,829	17,653	129,944	103,376	60	58
Dress & sport trousers, total	2,113	2,178	17,928	18,479	40	40
Knit	106	109	915	941	--	--
Woven	2,007	2,069	17,013	17,538	42	42
Jeans, jean cut trousers, dungarees, etc., total	7,858	14,691	107,604	80,826	65	63
Knit	79	60	644	489	1	1
Woven	7,779	6,773	92,269	80,337	65	63
Outerwear shorts, total	840	764	4,311	3,848	35	37
Knit	252	206	1,129	923	1	1
Woven	588	558	3,082	2,925	48	48
Work trousers, excl. dungarees, etc., woven	18	20	201	223	43	44
Underwear, total	16,419	16,078	32,125	31,333	63	67
Shorts & briefs, knit	8,448	8,364	12,674	12,548	64	67

(continued)

MATERIALS CONSUMED IN PRODUCTION

Boys' Wear

Total Fiber Consumption in the Production of Boys' Wear—1978, 1979
(continued)

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Boys' apparel, total (continued)						
Underwear, total (continued)						
Athletic (sleeveless) undershirts, knit	288	304	504	532	65%	69%
Lightweight T-shirts, knit	7,398	7,113	18,502	17,789	63	67
Woven undershorts	285	297	445	464	49	57

(e) = estimated
(r) = revised
*Percentage of total material consumption accounted for by cotton at the raw fiber (bale) level. "Percent Cotton" in this table represents a weighted calculation involving (1) 100% cotton materials, plus (2) cotton contents of blends and mixtures.

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

SHIPMENTS

Every five years the U.S. Bureau of the Census compiles a complete census of all U.S. manufacturers, the latest of which covers the year 1977. In interim years, the Bureau conducts an annual survey of manufactures, which yields industry data based on a probability sample. Data from the 1978 survey has been adjusted by the Census Bureau for comparability with the 1977 data.

In many product categories, value of shipment data for children's items has been combined with information on men's and/or women's wear. However, separate figures have been published on the value of shipments by all manufacturers in the U.S. in the product categories noted below.

(continued)

Value of Shipments By All U.S. Producers
Of Specified Categories of Boys' & Girls' Wear—1977, 1978

	Millions of $		% Change
	1978	1977	1978/1977
Boys' suits, coats & tailored jackets	$158.1	$149.7	+ 5.6%
Children's dresses & blouses	890.8	839.1	+ 6.2
Knit sport shirts	187.6	176.1	+ 6.5
Contract work on dresses & shirts	155.0	134.5	+15.2
Dresses & blouses, n.s.k.	548.1	528.5	+ 3.7
Children's coats & suits	216.6	191.5	+12.8
Contract work on coats & suits	15.7	17.9	-12.3
Coats, jackets, suits, snowsuits	200.4	173.6	+15.4
Children's outerwear, n.e.c.	703.6	765.9	- 8.1
Contract work on outerwear, n.e.c.	84.6	80.0	+ 5.7

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census, 1978 Annual Survey of Manufactures & 1977 Census of Manufactures (M78(AS)-2).

In addition to the two sources of information noted above, the U.S. Bureau of the Census publishes an annual report on production and value of shipments for a detailed list of apparel categories. These reports are based on a sample survey of manufacturers which excludes small firms, which are, however, covered in the above data.

Information from the sample surveys covered in the Current Industrial Reports series follows.

Children's & Girls' Wear

According to the U.S. Bureau of the Census' Current Industrial Reports, the value of identified categories of children's wear shipments for 1979 amounted to $2,108.4 million, an increase of 2.1% over the previous years' $2,065.0 million. Excluded from these totals is the value of shipments of children's wear, not separately reported, but combined with women's wear. (See Women's Wear Fact Files.)

Dress shipments valued at $388.3 million represented 18.4% of all industry shipments, more than any other single category. Second in rank to dresses was knit outerwear sport shirts accounting for 13.8% with $290.8 million. Third position was held by infants' playgarments, including creepers and rompers. This category captured $199.6 million or 9.5%.

A majority of the reported categories registered increases in 1979 vs. 1978. The largest of these increases was in the slips, vests, undershirts and other underwear except panties group which climbed 29.7% to $69.5 million during this period. The raincoat category rose 18.2% to $5.2 million while the vest group showed a 15.4% rise to $6.0 million. The two preceding categories showed the second and third largest increases between 1978 and 1979, respectively.

(continued)

Children's & Girls' Wear (continued)

Of the categories that did decrease, the biggest slide was registered in the play-garments, including playsuits and halter tops area. This group declined from $103.1 million in 1978 to $74.7 million in 1979, a loss of 27.5%. The only other reported groups to decline between 1978 and 1979 were nightgowns, pajamas and robes which slid 11.6%, 10.4% and 5.3% to $63.1 million, $145.7 million and $28.8 million, respectively.

Value of Shipments of Specified Types of Girls', Children's Toddlers' & Infants' Wear—1978, 1979

	(Million $) 1979	1978	% Change 1979/1978
Girls', Children's, Toddlers' & Infants' (reported categories), total	$2,108.4	$2,065.0	+ 2.1%
Dresses, total	388.3	355.5	+ 9.2
Girls', subteen & teenage	164.8	152.9	+ 7.8
Children's	150.4	148.1	+ 1.6
Infants' & toddlers'	73.1	54.5	+ 34.1
Blouses (excl. knit outerwear sport shirts), total	142.4	137.7	+ 3.4
Girls', subteen & teenage	91.3	88.8	+ 2.8
Children's, infants' & toddlers'	51.1	48.9	+ 4.5
Knit outerwear sport shirts, excl. sweat shirts, total	290.8	276.6	+ 5.1
Girls', subteen & teenage	56.4	56.6	- 0.4
Children's	158.0	141.7	+ 11.5
Infants' & toddlers'	76.4	78.3	- 2.4
Girls', children's & infants' sweaters, incl. sweater vests, total	49.9	48.0	+ 4.0
Coats, excl. coat & leggings sets, total	55.5	52.0	+ 6.7
Girls', subteen & teenage	30.2	30.6	- 1.3
Children's & infants'	25.3	21.4	+ 18.2
Coat & leggings sets, coat & snow pants sets & ski & snow suits, total	35.1	35.4	- 0.8
Raincoats and rain caps, total	5.2	4.4	+ 18.2
Jackets, total	37.3	40.1	- 7.0
Vests, total	6.0	5.2	+ 15.4
Suits, total	29.6	28.0	+ 5.7

(continued)

SHIPMENTS

Children's & Girls' Wear

Value of Shipments of Specified Types of Girls', Children's Toddlers' & Infants' Wear—1978, 1979
(continued)

	(Million $) 1979	1978	% Change 1979/1978
Girls', children's, toddlers' & infants' wear (reported categories), total (continued)			
Skirts, total	$ 44.7	$ 41.2	+ 8.5%
Slacks, incl. jean-cut casual, total	149.9	147.1	+ 1.9
Girls', subteen & teenage	74.8	79.4	- 5.8
Children's & infants'	75.1	67.7	+ 10.9
Jeans & dungarees, total	115.4	113.8	+ 1.4
Girls', subteen & teenage	48.4	49.8	- 2.8
Children's & infants'	67.0	64.0	+ 4.7
Shorts, total	43.6	42.3	+ 3.1
Girls', subteen & teenage	13.4	11.2	+ 19.6
Children's & infants'	30.2	31.1	- 2.9
Playgarments, incl. playsuits, halter tops, total	74.7	103.1	- 27.5
Girls', subteen & teenage	9.9	11.5	- 13.9
Children's & infants'	64.8	81.6	- 20.6
Playgarments, incl. creepers & rompers, infants', total	199.6	192.0	+ 4.0
Nightgowns, total	63.1	71.4	- 11.6
Girls' & children's	41.1	44.6	- 7.8
Infants' & toddlers'	22.0	26.8	- 17.9
Pajamas, incl. heavyweight sleeping garments made with feet, total	145.7	162.6	- 10.4
Girls' & children's	66.6	69.9	- 4.7
Infants' & toddlers'	79.1	92.7	- 14.7
Robes, total	28.8	30.4	- 5.3
Panties, incl. pettipants, total	87.0	84.3	+ 3.2
Girls' & children's	53.2	53.4	- 0.4
Infants' & toddlers'	33.8	30.9	+ 9.4
Slips, vests, undershirts & other underwear, except panties, total	69.5	53.6	+ 29.7
Girls' & children's	27.9	22.8	+ 22.4
Infants' & toddlers'	41.6	30.8	+ 35.1

(continued)

SHIPMENTS

Children's & Girls' Wear

Value of Shipments of Specified Types of Girls', Children's Toddlers' & Infants' Wear—1978, 1979
(continued)

	(Million $) 1979	1978	% Change 1979/1978
Girls', children's, toddlers' & infants' wear (reported categories), total (continued)			
Swimsuits, total	$ 46.3	$ 40.3	+ 14.9

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel, 1979, Series MA-23A(79)1.

Boys' Wear

The U.S. Census Bureau reported a total of $1.6 billion in boys' wear shipments in 1979, an increase of 0.6% over 1978. Excluded from this total is the value of shipments of boys' wear not separately reported but combined with men's wear.

Knit sport shirts, except sweat shirts, accounted for the greatest share of these shipments, $325.8 million or 20.2%. Following closely behind in importance were jeans and dungarees which represented 18.2% of shipments, $294.1 million. Third place was captured by jean-cut casual slacks, which held the number one position in 1977. This group was valued at $185.3 million and totaled 11.5% of shipments. Combined, these three classes accounted for almost half of the industries shipments during 1979.

Most categories registered increases during 1979, the largest by separate vests, which skyrocketed 71.2% to $10.1 million between 1978 and 1979. More modest gains of 18.6% and 16.6% were recorded by tailored suit-type dress and sport coats, including uniforms and woven sport shirts. These two categories rose to $30.0 million and $97.4 million, respectively, during the period.

The largest declines were registered by the shorts, except athletic, nontailored light outer jackets and boxer shorts groups. These product classes slid 24.9%, 23.8% and 23.8% to $17.8 million, $28.8 million and $1.6 million, respectively, over the year.

SHIPMENTS

Boys' Wear

Value of Shipments of Boys' Wear Items—1978, 1979

	Millions of $		% Change
	1979	1978	1979/1978
Boys' wear, total of categories specified below	$1,614.9	$1,605.7	+ 0.6%
Tailored suits, including uniform	97.6	96.8	+ 0.8
Overcoats, topcoats & tailored suburban & car coats, including uniform	10.2	10.6	- 3.8
Tailored suit-type dress & sport coats, including uniform	30.0	25.3	+18.6
Casual (nontailored) sport coats & jackets	15.5	17.2	- 9.9
Separate vests, excluding sweater vests	10.1	5.9	+71.2
Dress shirts, including uniform	44.2	46.8	- 5.5
Woven sport shirts	97.4	83.5	+16.6
Knit sport shirts, except sweat shirts	325.8	312.9	+ 4.1
Sweaters including sweater vests, knit cardigans & pullovers	25.9	29.2	+11.3
Separate dress & sport trousers, including uniform	117.2	135.9	-13.8
Jeans & dungarees	294.1	275.0	+ 6.9
Jean-cut casual slacks	185.3	199.6	- 7.2
Shorts, except athletic shorts	17.8	23.7	-24.9
Nontailored heavy outer jackets except ski	59.5	64.7	- 8.0
Nontailored light outer jackets	28.8	37.8	-23.8
Coveralls, overalls, work pants & jumpsuits	45.9	45.1	+ 1.8
Pajamas & other nightwear, excluding robes	67.7	59.8	+13.2
Boxer shorts	1.6	2.1	-23.8
Lightweight undershirts with ½ sleeve, excluding T-shirts made for outerwear	66.0	65.0	+ 1.5
Supporter-type knit briefs	74.3	68.8	+ 8.0

Source: U.S. Department of Commerce, Bureau of the Census, Current Industrial Reports, Apparel, MA-23A(79)-1.

SHIPMENTS

By Region

The children's wear industry is becoming less and less concentrated, attested to by the fact that data on shipments from many more states was made available in 1977 than in 1972.

In the children's knit sport shirt group, North Carolina was the dominant state in 1977, accounting for 15.5% of shipments. A close second to North Carolina was New York, whose importance to the group declined radically between 1972 and 1977. In 1972, New York States' $28.6 million represented almost one fourth of the category shipments but 1977's $27.0 million held only a 15.3% share of the market.

North Carolina also held the prime position for contract work shipments on children's apparel. The states' $38.3 million accounted for 21.3% of all children's wear contract work, reported by the U.S. Department of Commerce in the 1977 Census of Manufactures. The $37.7 million in contract work shipments from Pennsylvania ranked second with 20.9% of the market. Third and Fourth place were delegated to Virginia and New York with 13.3% and 12.3%, respectively.

Value of Shipments of Children's Apparel by All Producers
By Geographic Area

	Millions of $		% of Total*
	1977	1972	1977
Children's knit sport shirts, U.S. total	$176.1	$115.3	100.0%
Middle Atlantic Division			
New York	27.0	28.6	15.3
Pennsylvania	6.4	na	3.6
South Atlantic Division			
North Carolina	27.3	na	15.5
Pacific Division			
California	12.5	na	7.1
Contract work on children's dresses & shirts, U.S. total	134.5	na	100.0
Middle Atlantic Division			
New York	12.4	na	9.2
New Jersey	5.9	na	4.4
Pennsylvania	28.5	na	21.2
South Atlantic Division			
Virginia	20.0	na	14.9
North Carolina	19.4	na	14.4
South Carolina	13.9	na	10.3
Florida	2.3	na	1.7
Pacific Division			
California	9.0	na	6.7

(continued)

SHIPMENTS

By Region

Value of Shipments of Children's Apparel by All Producers
By Geographic Area

	Millions of $		% of Total*
	1977	1972	1977
Contract work on children's coats & suits, U.S. total	17.9	na	100.0%
Middle Atlantic Division			
New Jersey	4.2	na	23.5
Pennsylvania	3.0	na	16.8
South Atlantic Division			
North Carolina	2.3	na	12.8
Georgia	2.1	na	11.7
Contract work on children's outerwear, n.e.c., U.S. total	80.0	na	100.0
New England Division			
Massachusetts	10.0	na	12.5
Middle Atlantic Division			
New York	9.7	na	12.1
New Jersey	6.8	na	8.5
Pennsylvania	6.2	na	7.8
South Atlantic Division			
Virginia	4.0	na	5.0
North Carolina	16.6	na	20.8
Pacific Division			
California	4.0	na	5.0

na = not available
n.e.c. = not elsewhere classified
*Percent distribution does not equal 100.0% due to disclosures. States with disclosures are not shown.

Source: U.S. Department of Commerce,
Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

THE MARKET FOR CHILDREN'S WEAR

Births

During 1980 there were an estimated 3,598,000 live births in the U.S., nearly 4% more than in 1979. The birthrate was 16.2 live births per 1,000 population, and the fertility rate was 69.2 live births per 1,000 women aged 15-44 years. The birthrate was 3% higher and the fertility rate was 2% higher in 1980 than in 1979.

The increase in the number of births and the birthrate in 1980 is the result of the continued growth in the number of women in the childbearing ages as well as the increase in the rate of childbearing. The number of women in the childbearing ages increased 2% between 1979 and 1980, and, according to projections prepared by the U.S. Bureau of the Census, the number of these women will increase slightly more than 1% annually between 1980 and 1985. Therefore, the number of births will continue to increase unless there are offsetting declines in age-specific birthrates.

Live Births in the U.S., Birthrates & Fertility Rates, 1970-1980

Year	Number (thous.)	Birthrate*	Fertility Rate**
1980(p)	3,598.0	16.2	69.2
1979(p)	3,473.0	15.8	68.0
1978	3,333.3	15.3	66.6
1977	3,326.6	15.4	67.8
1976	3,167.8	14.8	65.8
1975	3,144.2	14.8	66.7
1974	3,160.0	14.9	68.4
1973	3,137.0	14.9	69.2
1972	3,258.4	15.6	73.4
1971	3,556.0	17.2	81.8
1970	3,731.4	18.4	87.9

(p) = provisional
*Live births per 1,000 population
**Live births per 1,000 women aged 15-44 years

Source: U.S. Dept. of Health & Human Services, National Center for Health Statistics.

Youth Population

The number of boys and girls, five years of age and younger, will increase by 14.1% by the year 2000 over the 1979 total, making this the fastest growing children's group through that year, according to the U.S. Bureau of the Census Series II projections of the population (which assume a fertility rate of 2.1% or at the replacement level).

The number of youths between the ages of 10 and 16 will show a 9.6% decline through 1985 from the 1979 total, but gains will be registered by the year 2000 in this age group.

Youth Population

U.S. Male & Female Youth Population Through Age 16, 1979 & Projections to 2000 (Series II)

	U.S. Youth Population (Number in thous.)				% Change	Percent of total Population			
	1979	1985	1990	2000	2000/1979	1979	1985	1990	2000
Total, all ages	220,099	232,880	243,513	260,378	+ 18.3%	100.0%	100.0%	100.0%	100.0%
16 years & younger	58,394	58,800	61,560	65,030	+ 11.4	26.5	25.2	25.3	25.0
Male	29,816	30,086	31,540	33,333	+ 11.8	13.5	12.9	13.0	12.8
Female	28,578	28,714	30,020	31,697	+ 10.9	13.0	12.3	12.3	12.2
15 & 16 years	8,181	7,170	6,366	8,025	- 1.9	3.7	3.1	2.6	3.1
Male	4,177	3,659	3,259	4,113	- 1.5	1.9	1.6	1.3	1.6
Female	4,004	3,511	3,107	3,912	- 2.3	1.8	1.5	1.3	1.5
10 to 14 years	18,071	16,567	16,718	20,153	+ 11.5	8.2	7.1	6.9	7.7
Male	9,212	8,471	8,564	10,329	+ 12.1	4.2	3.6	3.5	4.0
Female	8,859	8,096	8,154	9,824	+ 10.9	4.0	3.5	3.4	3.7
5 to 9 years	16,493	16,260	19,040	19,000	+ 15.2	7.5	7.0	7.8	7.3
Male	8,424	8,324	9,754	9,738	+ 15.6	3.8	3.6	4.0	3.7
Female	8,069	7,936	9,286	9,262	+ 14.8	3.7	3.4	3.8	3.6
Under 5 years	15,649	18,803	19,437	17,852	+ 14.1	7.1	8.1	8.0	6.9
Male	8,003	9,632	9,963	9,153	+ 14.4	3.6	4.1	4.1	3.5
Female	7,646	9,171	9,474	8,699	+ 13.8	3.5	4.0	3.9	3.4

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25,
No. 704 (July 1977).
No. 870, (January 1980).

Estimated Youth Population of the U.S.
By Single Years of Age & By Sex, 1979
(Numbers in Thous.)

	1979 Total			1985 Total		
	Total	Male	Female	Total	Male	Female
Total, through 16	58,394	29,816	28,578	58,800	30,086	28,714
Under 5 years	15,649	8,003	7,646	18,803	9,632	9,171
Under 1 year	3,281	1,680	1,601	3,887	1,993	1,893
1 year	3,191	1,629	1,561	3,841	1,966	1,875
2 years	3,104	1,590	1,514	3,727	1,910	1,817
3 years	2,990	1,528	1,463	3,699	1,895	1,804
4 years	3,084	1,576	1,508	3,650	1,868	1,782
5 to 9 years	16,493	8,424	8,069	16,260	8,324	7,936
5 years	3,010	1,541	1,468	3,493	1,790	1,702
6 years	3,102	1,581	1,521	3,355	1,715	1,640
7 years	3,298	1,683	1,651	3,254	1,655	1,579
8 years	3,558	1,820	1,738	3,100	1,587	1,513
9 years	3,525	1,799	1,726	3,078	1,577	1,501
10 to 14 years	18,071	9,212	8,859	16,567	8,471	8,096
10 years	3,581	1,828	1,754	3,255	1,666	1,589
11 years	3,416	1,744	1,672	3,067	1,570	1,496
12 years	3,525	1,797	1,728	3,163	1,617	1,546
13 years	3,632	1,850	1,782	3,354	1,711	1,643
14 years	3,917	1,993	1,923	3,728	1,907	1,822
15 & 16 years	8,181	4,177	4,004	7,170	3,659	3,511
15 years	4,080	2,085	1,995	3,644	1,861	1,783
16 years	4,100	2,092	2,009	3,526	1,798	1,728

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 870.

Youth Population of the U.S. by Size of Family, 1979

	Total (Numbers in Thous.)	Percent
All Families	57,804	100.0%
No children under 18	27,433	47.5
With children under 18	30,371	52.5
1 child under 18	11,882	20.6
2 children under 18	11,005	19.0
3 children under 18	4,913	8.5
4 children under 18	1,745	3.0
5 children under 18	549	1.0
6 or more children under 18	249	0.5
No children under 6	44,801	77.5
With children under 6	13,003	22.5
1 child under 6	9,053	15.7
2 children under 6	3,449	6.0
3 children under 6	438	0.8
4 or more children under 6	63	0.1
No children under 3	50,008	86.5
With children under 3	7,796	13.5
1 child under 3	6,857	11.9
2 children under 3	898	1.6
3 or more children under 3	41	0.1

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 352 (July 1980).

Youth Population of the U.S. by State, 1979
(Numbers in Thous.)

	Resident Population	Under 5 years	5 to 17 years	17 years & younger	% of 17 & younger
United States, total	220,099	15,649	46,922	62,571	100.0%
Regions:					
Northeastern States	49,002	2,977	10,181	13,158	21.0
North Central States	58,406	4,131	12,692	16,823	26.9
The South	71,550	5,347	15,471	20,818	33.3
The West	41,142	3,194	8,578	11,772	18.8
Northeast:					
New England	12,291	722	2,575	3,297	5.3
Middle Atlantic	36,711	2,255	7,606	9,861	15.8

(continued)

Youth Population of the U.S. by State, 1979
(Numbers in Thous.)
(continued)

	Resident Population	Under 5 years	5 to 17 years	17 years & younger	% of 17 & younger
North Central:					
East North Central	41,287	2,917	9,079	11,996	19.2%
West North Central	17,118	1,213	3,613	4,826	7.7
South:					
South Atlantic	34,976	2,414	7,348	9,762	15.6
East South Central	14,105	1,083	3,135	4,218	6.7
West South Central	22,470	1,850	4,988	6,838	10.9
West:					
Mountain	10,673	967	2,370	3,337	5.3
Pacific	30,469	2,227	6,209	8,436	13.5
New England:					
Maine	1,097	77	241	318	0.5
New Hampshire	887	60	193	253	0.4
Vermont	493	34	109	143	0.2
Massachusetts	5,769	323	1,193	1,516	2.4
Rhode Island	929	53	193	246	0.4
Connecticut	3,115	175	645	820	1.3
Middle Atlantic:					
New York	17,648	1,087	3,663	4,750	7.6
New Jersey	7,332	452	1,548	2,000	3.2
Pennsylvania	11,731	716	2,395	3,111	5.0
East North Central:					
Ohio	10,731	746	2,339	3,085	4.9
Indiana	5,400	393	1,201	1,594	2.5
Illinois	11,229	806	2,426	3,232	5.2
Michigan	9,207	651	2,086	2,737	4.4
Wisconsin	4,720	321	1,027	1,348	2.2
West North Central:					
Minnesota	4,060	285	883	1,108	1.8
Iowa	2,902	203	619	822	1.3
Missouri	4,867	334	1,009	1,343	2.1
North Dakota	657	52	144	196	0.3
South Dakota	689	55	150	205	0.3
Nebraska	1,574	116	333	449	0.7
Kansas	2,369	170	475	645	1.0

(continued)

Youth Population of the U.S. by State, 1979
(Numbers in Thous.)
(continued)

	Resident Population	Under 5 years	5 to 17 years	17 years & younger	% of 17 & younger
South Atlantic:					
Delaware	582	40	125	165	0.3%
Maryland	4,148	255	893	1,118	1.8
District of Columbia	656	39	129	168	0.3
Virginia	5,197	342	1,097	1,439	2.3
West Virginia	1,878	142	397	539	0.9
North Carolina	5,606	399	1,214	1,613	2.6
South Carolina	2,932	234	672	906	1.4
Georgia	5,117	396	1,160	1,556	2.5
Florida	8,860	566	1,660	2,226	3.6
East South Central:					
Kentucky	3,527	271	770	1,041	1.7
Tennessee	4,380	313	933	1,246	2.0
Alabama	3,769	284	841	1,125	1.8
Mississippi	2,429	213	591	804	1.3
West South Central:					
Arkansas	2,180	168	471	639	1.0
Louisiana	4,018	342	952	1,294	2.1
Oklahoma	2,892	221	594	815	1.3
Texas	13,380	1,119	2,971	4,090	6.5
Mountain:					
Montana	786	63	173	236	0.4
Idaho	905	90	203	293	0.6
Wyoming	450	42	97	139	0.2
Colorado	2,772	217	583	800	1.3
New Mexico	1,241	112	294	406	0.6
Arizona	2,450	215	538	753	1.2
Utah	1,367	174	331	505	0.8
Nevada	702	55	152	207	0.3
Pacific:					
Washington	3,926	281	815	1,096	1.8
Oregon	2,527	190	509	699	1.1
California	22,694	1,636	4,853	6,219	9.9
Alaska	406	43	103	146	0.2
Hawaii	915	76	198	274	0.4

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 875 (January 1980).

RETAIL SALES

In 1972-1973 the U.S. Bureau of Labor Statistics conducted quarterly interview surveys to develop information on consumer expenditures as a basis for revising the Consumer Price Index.

Reported patterns in annual spending for boys', girls', children's and infants' wear, together with 1978 data on personal consumption expenditures compiled by the U.S. Bureau of Labor Statistics, have been drawn on to develop the following estimates on expenditures. The dollar estimates represent the value at retail of all merchandise reaching consumers, including through other than normal retail channels—such as direct purchases from non-retailers (manufacturers, wholesalers), clothing supplied by institutions, etc.

Estimated Personal Consumption Expenditures, 1978
(Millions of Dollars)

Total, boys', girls', children's	$16,265
Boys' wear (2 - 15 years of age)	5,853
Coats, including all-weather coats	369
Heavy & lightweight outerjackets	386
Sweaters	135
Snow/ski suits, plastic raincoats	59
Suits, vests, sport coats, jackets	380
Dress & casual slacks, pants	795
Jeans, dungarees, work pants, shorts	990
Swimwear, beachwear, special sports clothing, n.e.c.	550
Shirts (dress, sport, work), tops	1,071
Underwear	398
Nightwear, robes	176
Hosiery	275
Hats, gloves, accessories, total	269
Hats, caps, etc.	35
Gloves, mittens	58
Small leather goods, ties, other accessories	176
Girls' wear (2 - 15 years of age)	7,220
Coats, including all-weather coats	715
Heavy & lightweight outerjackets	217
Sweaters	224
Snow/ski suits, plastic raincoats, jackets	87
Dresses, jumpers	722
Suits, pantsuits	448
Shirts, blouses, tops	1,054
Jeans, pants, skirts, shorts, vests	1,575
Uniforms & other special clothing	108
Swimwear, beachwear, special sports clothing, n.e.c.	396
Innerwear	462
Nightwear, robes	318
Hosiery, tights, leotards, etc.	476
Hats, gloves, accessories, total	418
Hats, caps, etc.	36
Gloves, mittens	43
Other accessories, small leather goods, handbags, etc.	339

(continued)

Estimated Personal Consumption Expenditures, 1978
(Millions of Dollars)
(continued)

Total, boys', girls', children's	
Children's wear (under 2 years of age)	$ 3,192
Outerwear	651
Diapers - disposable	744
Diapers, washable; booties, socks	587
Layettes, etc.	1,210

n.e.c. = not elsewhere classified

Source: Estimates by Fairchild Market Research Division based on U.S. Bureau of Labor Statistics report on Consumer Expenditure Survey: 1972-1973 (Bulletin 1997) and U.S. Department of Commerce report on personal consumption expenditures (Survey of Current Business, July 1979).

The Market Research Corporation of America and CSA Research also estimated sales of infants' and boys' wear by type. Their results are summarized in the following tables.

Amount of Money Spent on Infants' Wear by Type
(Millions of Dollars)

	1980		1976		% Change
	Total	% of Total	Total	% of Total	1980/1976
Nightwear	$204.8	23.4%	$122.7	22.7%	+ 66.9
Tops	130.4	14.9	77.8	14.4	+ 67.6
Bottoms	111.2	12.7	57.8	10.7	+ 92.4
Outerwear	56.9	6.5	34.0	6.3	+ 67.3
Underwear	55.1	6.3	36.7	6.8	+ 50.1
Sweaters and swimsuits	41.1	4.7	24.9	4.6	+ 55.1
Socks	41.1	4.7	26.5	4.9	+ 65.1
All other	234.7	26.8	160.6	29.7	+ 46.1
Total	875.3	100.0	540.6	100.0	+ 61.9

Source: Chain Store Age, Based on Data from Market Research Corporation of America and CSA Research, April 1981.

Amount of Money Spent on Boys' Wear by Type, 1979
(Millions of Dollars)

	Total	% of Total
Casual pants & jeans	$1,349.4	27.0%
Sport shirts & tops	1,092.3	21.9
Outerwear	480.1	9.6
Slacks & shorts	417.6	8.4
Underwear	328.3	6.6
Sweaters & bathing suits	323.4	6.5
Pj's & bathrobes	314.0	6.3
Socks	296.8	5.9
Suits & sportcoats	256.6	5.1
Dress shirts	133.3	2.7
TOTAL	4,991.8	100.0

Source: Chain Store Age, Based on Data from Market Research Corporation of America and CSA Research, October 1980.

By Store Type

According to the latest official data on retail sales by type of outlet, reported in the 1977 Census of Retail Trade, infants' and toddlers' wear reached $2.5 billion, girls' and subteen's wear amounted to over $1.9 billion and boys' and young mens' totaled about $3.9 billion in sales through retail outlets with payrolls in 1977.

During 1977, department stores took the major share of the reported sales pie, accounting for 64% of the infants' and girls' wear and 70% of boys' wear volume. This compares with 1972's market shares of 60% and 58%, respectively, for these same stores. This rise was due mainly to a huge campaign by large chains, such as Sears, Ward and Penney, to capture this highly profitable market.

Children's wear captured 17.7% of demand in the women's and children's wear departments of department stores; while representing 14.7% and 3.7% of sales of this same department in family clothing stores and women's ready-to-wear stores, respectively, according to figures released by the U.S. Bureau of the Census in the 1977 Census of Retail Trade. Boys' and young men's wear represented 25.9% of men's and boys' wear sales in department stores. This group also accounted for 14.6% of men's and boys' wear sales in family clothing stores and 6.0% of the sales in men's and boys' wear stores.

The gift market represents a sizable portion of spending for children's wear. In the analysis of consumer expenditures in 1972-1973, conducted by the U.S. Bureau of Labor Statistics, gifts for persons not in the family represented 8.3% of total spending for boys' wear, 8.6% of the spending for girls' wear, and 31.1% of spending for children's wear (children under 2 years of age).

The retail market for boys' wear climbed to an estimated $5 billion in 1979, according to Chain Store Age, October 1980. In terms of real dollars, this was only a 5.9% increase over 1975, taking into consideration that inflation for men's/boys' wear was 17.1% for the period, according to the Bureau of Labor Statistics.

(continued)

By Store Type (continued)

Salomon Associates reports in the January 1981 issue of Chain Store Age that the children's wear market is staying with the "preppy" look. Thanks to this image and the shift in demographics, which has revived the 0 to 6x size ranges, sales of children's wear are heaviest during the Christmas season and in the month of August when consumers are making "back-to-school" purchases.

Retail Sales of Specified Boys' & Children's Wear Categories
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

Store types reporting:	Infants'/Toddlers' Wear				Girls'/Subteens' Wear			
	Stores		Sales		Stores		Sales	
	No.	%	Mil.$	%	No.	%	Mil.$	%
TOTAL*	35,087	100.0%	$2,537.6	100.0%	30,678	100.0%	$1,939.8	100.0%
Department stores	8,732	24.9	1,629.8	64.2	8,191	26.7	1,239.2	63.9
Women's ready-to-wear stores**	5,475	15.6	190.0	7.5	6,167	20.0	224.2	11.6
Family clothing stores	8,925	25.4	256.1	10.1	8,952	29.2	251.7	13.0
Men's wear stores	--	--	--	--	477	1.5	5.4	0.3
Shoe stores	4,108	11.7	41.6	1.6	55	0.2	0.1	#
Children's wear stores	4,225	12.0	346.4	13.7	3,239	10.6	168.8	8.7
Non-store retailers:								
Mail order houses (catalog sales)	3,622	10.3	73.7	2.9	3,597	11.7	50.4	2.6

	Boys'/Young Men's Wear***			
	Stores		Sales	
	No.	%	Mil.$	%
TOTAL****	33,554	100.0%	$3,898.1	100.0%
Department stores	8,575	25.6	2,737.9	70.2
Men's, boys' wear stores	5,880	17.5	378.7	9.7
Women's ready-to-wear stores	2,654	7.9	104.5	2.7
Family clothing stores	9,886	29.5	436.8	11.2
Children's wear stores	2,966	8.8	148.4	3.8
Non-store retailers:				
Mail order houses	3,593	10.7	91.8	2.4

*Total represents sales reported for the store types listed above. Not all types of stores selling women's and children's wear broke out merchandise line sales data in reports to the Census Bureau. However, the above reflects the total sales in the major types of outlets handling each category.

**Detailed data on merchandise line sales of Women's Accessory & Specialty Stores (including Furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of $858.8 million in 1977.

***Includes boys' sizes 2 to 16; young men's sizes 13 to 20 and students' 32 to 44, clothing, furnishings and accessories.

****Total is based only on stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major outlet types.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

RETAIL SALES

By Store Type

Children's Wear Sales by Type of Merchandise
In Department Stores, Women's Ready-to-Wear Stores & Family Clothing Stores, 1977
(Includes only stores with payroll)

	Department Stores	Women's Ready-To-Wear Stores	Family Clothing Stores
Total store sales (millions of $)	$76,909.4	$12,250.3	$7,883.6
Women's & children's wear, except footwear	16,250.7	11,066.5	3,471.6
Sales by type of merchandise:			
Total	100.0%	100.0%	100.0%
Children's wear	17.7	3.7	14.7
Infants' & toddlers' wear	10.0	1.7	7.4
Girls' & subteens' wear	7.6	2.0	7.3

Source: Fairchild Market Research Department based on U.S. Bureau of the Census, Census of Retail Trade, 1977.

Boys' Wear Sales by Type of Merchandise
In Department Stores, Men's Wear Stores & Family Clothing Stores, 1977
(Includes only stores with payroll)

	Department Stores	Men's & Boys' Wear Stores	Family Clothing Stores
Total store sales (millions of $)	$76,909.4	$6,838.8	$7,883.6
Men's & boys' wear, exc. footwear	10,574.9	6,275.4	3,001.5
Sales by type of merchandise:			
Total	100.0%	100.0%	100.0%
Boys'/young men's wear	25.9	6.0	14.6

Source: Fairchild Market Research Department based on Census of Retail Trade, 1977, U.S. Bureau of the Census.

RETAIL SALES

By Store Type

Department Stores

Over 64% of all children's wear sales were consumated in department stores in 1977, up from the 60% figure recorded in 1972. These sales represented 17.7% of the women's and children's wear departments' sales. A majority of boys'/young men's wear sales, 70.2%, are transacted by department stores. This group accounts for nearly 26% of sales volume of their men's and boys' wear, according to the U.S. Bureau of the Census.

Annual operating results compiled by the National Retail Merchants Association show that among department stores with annual sales volume of over $1 million in 1979, the typical store showed gains in almost all categories of boys' and girls' wear over 1978. The one exception was girls' size 6 to 16 or 8 to 14 which registered a 4.7% decline.

According to the National Retail Association, sales of girls' wear sizes 3 to 6X and 7 to 14 showed typical (median) gains of 4.0% and 7.9%, respectively, in 1979 while apparel accessories and intimate apparel grew by 9.8% and 4.7% during the same period. Sales of boys' wear and furnishings grew from between 3.0% and 10.1% in 1979 compared to the prior year.

Merchandising & Operating Results in Girls' & Boys' Wear Departments in Department Stores With Total Annual Sales Over $1 Million, 1979
(Typical Results)

	Girls' Clothing, Sizes 3-6X and 7-14				
	3 to 6X	7 to 14	6 to 16 or 8 to 14	Apparel Accessories	Intimate Apparel
Net sales, % change from last year	+ 4.0%	+ 7.9%	- 4.7%	+ 9.8%	+ 4.7%
Sales, % of merchandise division	7.3	14.6	5.8	7.6	4.7
Sales, % of total store sales	0.4	0.8	0.3	0.5	0.3
$ sales per square foot of selling space	$ 58.0	$ 74.9	$ 57.0	$ 88.3	$ 57.3
Cumulative markon, %	49.8%	50.3%	51.2%	49.4%	49.2%
Gross margin, % of sales incl. cash discounts	45.4	47.1	43.6	45.8	45.2
Markdowns, retail, % of sales	15.6	13.4	20.2	8.7	9.2
Returns, % of sales	6.6	7.6	10.9	2.8	3.5
Number of stock turns	3.9	4.4	3.4	3.0	2.7
Salespeople's salaries, % of sales	7.8	7.9	7.4	7.8	7.8
Sales promotions, % of sales	3.3	3.0	3.1	2.4	2.6

(continued)

RETAIL SALES

By Store Type

Department Stores

Merchandising & Operating Results in Girls' & Boys' Wear Departments
In Department Stores With Total Annual Sales Over $1 Million, 1979
(Typical Results)
(continued)

	Boys' Clothing, Sizes 2-44			
	2 to 6X or 8	4 to 12 or 4 to 16	13 to 20 & 32 to 44	Boys' Furnishings (All Ages)
Net sales, % change from last year	+ 10.1%	+ 5.9%	+ 3.0%	+ 9.4%
Sales, % of merchandise division	6.8	14.4	20.9	13.1
Sales, % of total store sales	0.4	0.8	1 3	0.6
$ sales per square foot of selling space	$ 66.9	$ 73.7	$ 96.0	$ 75.0
Cumulative markon, %	48.2%	48.2%	48.6%	48.5%
Gross margin, % of sales incl. cash discounts	43.5	40.2	38.0	44.7
Markdowns, retail, % of sales	12.5	13.8	15.4	10.2
Returns, % of sales	5.9	8.2	9.5	5.9
Number of stock turns	3.5	2.6	2.5	3.1
Salespeople's salaries, % of sales	7.7	7.6	6.6	7.7
Sales promotions, % of sales	3.4	3.9	2.6	3.2

Source: National Retail Merchants Association, Merchandising and Operating Results of 1979, (1980 Edition).

Seasonal Pattern

Percent of Years' Total Sales by Month
In Infants' & Children's Wear Departments
(Five Year Average)

Month	Infants' Wear	Girls' Wear	Boys' Wear
January	5.3%	3.7%	4.1%
February	5.5	4.6	4.7
March	8.6	9.1	8.0
April	7.9	7.6	7.9
May	6.2	6.1	6.3
June	5.9	5.8	6.4
July	5.9	5.8	5.4
August	8.4	11.7	10.5
September	9.2	9.0	9.0
October	9.3	8.9	8.2
November	11.3	11.1	10.8
December	16.5	16.6	18.7

Source: Newspaper Advertising Bureau, Covering 1961-1965 indexes.

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage

Month	Boys' Furnishings	Boys' Outer Apparel	Girls' Sportswear	Toddlers & Tots
January	4.2	4.4	2.5	4.5
February	4.2	6.2	4.5	4.9
March	5.7	10.3	6.5	7.1
April	8.2	14.3	6.7	11.6
May	7.8	5.4	8.1	5.6
June	6.3	4.6	6.6	6.9
July	7.5	6.0	7.3	6.9
August	21.0	19.6	21.6	12.2
September	7.0	5.8	7.2	10.8
October	7.8	7.6	7.1	9.2
November	10.5	8.4	12.5	10.4
December	9.8	7.4	9.4	9.9
Total linage	100.0%	100.0%	100.0%	100.0%

Source: The Advertising Checking Bureau, Inc., based on the Advertising Checking Bureau, Inc.,—Neustadt Reports, covering retail newspaper advertising linage in all news papers in seven cities: Chicago, Dallas, Philadelphia, Cincinnati, Cleveland, Los Angeles, and Washington. (1981 Newspaper Planbook).

PRICES

Producer

Producer prices for all items rose at a 14% rate in 1980, according to preliminary data released by the U.S. Bureau of Labor Statistics. Children's and infants' wear costs also rose but no classification increased as much as the national average.

The largest jump in costs came in the infants' and children's underpants group, which rose 13.3% over the first six months of 1980. Increases, for the total year, of 8.9%, 7.1%, and 4.6% were registered in infants' and children's knee socks, children's sport shirts and children's dresses, respectively.

Producer Price Index

	1980 Average (p)	1979 Average	% Change 1980/1979
All Items	268.6	235.6	+14.0%
Children's sport shirts	119.5	111.6	+ 7.1
Children's dresses	108.3	103.5	+ 4.6
Infants' & children's underpants	124.3*	109.7	+13.3
Infants' & children's knee socks	119.3	109.5	+ 8.9

(p) = preliminary
*January to June average

Source: U.S. Department of Labor, Bureau of Labor Statistics.

PRICES

Consumer

Girls' wear, as a category, rose 3.6% in the 1980 period from 1979's index of 99.8. This is only a minimal rise, however, compared to an inflation rate of 13.5% for the entire economy. Leading the charge towards higher girls' wear prices was underwear, nightwear, hosiery and accessories which registered a 5.3% increase. More modest rises of 4.9% and 1.1% were marked by separates and sportswear, and coats, jackets, dresses and suits, respectively.

Prices of boys' wear rose faster than girls' wear, at a 5.3% rate, but still quite reasonable compared to the entire economy. The largest jump came from suits, trousers, sportscoats and jackets which climbed at a 6.6% rate for the year. Lagging behind were furnishings and coats, jackets, sweaters and shirts, which rose at 6.2% and 5.4% rates, respectively.

The largest rise of all was registered by infants' and toddlers' wear, which, with an 8.4% inflation rate, was still well below the national average.

Consumer Price Index
(December 1977=100)

	1980 Average	1979 Average	% Change 1980/1979
All Items	246.8	217.4	+13.5%
GIRLS'	103.4	99.8	+ 3.6
Coats, jackets, dresses, and suits	100.1	99.0	+ 1.1
Separates and sportswear	102.4	97.6	+ 4.9
Underwear, nightwear, hosiery and accessories	110.7	105.1	+ 5.3
BOYS'	109.8	103.5	+ 6.1
Coats, jackets, sweaters, and shirts	105.1	99.7	+ 5.4
Furnishings	114.8	108.1	+ 6.2
Suits, trousers, sportcoats, and jackets	111.5	104.6	+ 6.6
INFANTS' AND TODDLERS' (1967=100)	239.0	220.9	+ 8.2

Source: U.S. Department of Labor, Bureau of Labor Statistics.

PRICES

Consumer

Median Regional Retail Price Points for Infants' Wear

Region	1980	1976	% Change 1980/1976
Northeast	$3.38	$2.47	+36.8
South	3.13	2.19	+42.9
North Central	3.11	2.22	+40.1
Mountain Southwest	3.05	2.27	+34.4
Pacific	3.41	2.48	+37.5

Source: Chain Store Age, Based on data from Market Research Corporation of America and CSA Research, April 1981.

BUYING HABITS

Children's wear presents a unique situation in consumer apparel purchases. For younger children, parents --usually mothers—play the key role in selection and purchase. Clothing selected must meet her criteria for appropriateness and also must be consistent with her perception of what the child desires. As children grow older, however, this second element—what the child desires—plays an increasingly important role, and children seem to be taking on this role at an increasingly early age.

A serious "conflict of interest" often develops between what the child desires and what the mother considers appropriate—especially between mothers and young girls. It is this basic purchase dynamics situation which literally controls the character of the children's wear market. Criteria of appropriateness (from either the mother's or the children's point of view) determines to a large extent the place of purchase, the amount spent, and the selection.

BUYING HABITS

The following information on children's and boys' wear has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research Inc. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "girls" includes girls 13 years old and younger while "boys" includes those 16 years and younger.)

Boys' Wear

Distribution of Boys' Wear Purchases by Type of Retail Outlet, 1980

	All Shirts	Jeans & Pants	Underwear	Suits/ Jackets	Outercoats & Jackets
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%
National chains	25.5	27.1	28.8	28.5	32.4
Department stores	21.8	23.6	12.7	19.8	17.4
Discount stores	31.0	25.7	39.5	27.4	30.0
Specialty stores	11.7	15.3	4.5	16.6	11.2
All others	10.1	8.3	14.4	7.7	9.0

Percent of Purchases of Boys' Shirts by Price Point, 1980

	Dress Shirts		Sport Shirts	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $5.00	43.7	22.0	45.9	24.3
$5.00 - $8.99	35.7	37.5	35.9	39.4
$9.00 - $12.99	13.3	21.5	12.2	20.9
$13.00 & over	7.41	19.0	6.0	15.4

In 1980 the average price paid for a dress shirt by the members of the NPD Panel was $6.43.

Underwear

Percent of Purchases of Boys' Underwear by Price Point, 1980

	Undershirts		Undershorts	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $1.00	36.4	20.5	38.4	24.9
$1.00 - $1.49	32.6	29.1	40.7	40.4
$1.50 - $2.24	19.9	26.4	15.5	22.5
$2.25 & over	11.2	24.0	5.5	12.5

Source for the three preceding tables: NPD Research.

BUYING HABITS

Boys' Wear

Distribution of Purchases of Boys' Suits & Sports Coats by Price Point, 1980

	Suits		Sports Coats	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $22.00	27.3	10.9	45.6	19.8
$22.00 - $29.99	22.7	26.2	11.1	9.3
$30.00 - $55.99	29.3	30.8	30.5	39.2
$56.00 & over	20.7	43.0	12.8	31.7

Source: NPD Research.

Distribution of Purchases of Boys' Outerwear by Price Points, 1980

	Jackets		All Weather Coats		Other Coats	
	Units	Dollars	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $10.00	29.3	10.9	12.8	4.7	7.6	2.2
$10.00 - $19.99	38.8	30.9	36.6	24.8	44.2	29.8
$20.00 - $29.99	18.6	25.3	27.3	28.3	29.2	31.1
$30.00 & over	13.3	33.0	23.3	42.3	19.0	36.9

Source: NPD Research.

Infants' Wear

Distribution of Purchases of Infants' Wear by Type of Retail Outlet, 1980

	All Items
Total purchases	100.0%
National chains	20.4
Department stores	15.2
Discount stores	41.6
Specialty stores	10.3
All others	12.5

Source: NPD Research.

BUYING HABITS

Girls' Wear

Distribution of Girls' Wear Purchases by Type of Retail Outlet, 1980

	Blouses & Tops	Dresses & Skirts	Jeans & Pants	Outerwear	Nightwear
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%
National chains	24.1	26.2	28.4	31.2	28.5
Department stores	18.2	21.3	19.9	16.7	17.8
Discount stores	33.1	29.4	24.6	30.5	34.0
Specialty stores	13.7	16.5	16.6	13.3	10.5
All others	10.9	6.7	10.5	8.3	9.2

Source: NPD Research.

Percent of Purchases of Girls' Shirts/Blouses by Price Point, 1980

	Shirts/ Blouses		All Other Tops	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $3.00	18.3	6.2	46.0	23.3
$3.00 - $4.99	25.7	17.2	31.5	33.4
$5.00 - $8.99	40.5	45.5	19.2	33.3
$9.00 & over	15.5	31.1	3.3	10.0

Source: NPD Research.

Distribution of Purchases of Girls' Slacks & Skirts by Price Points, 1980

	Slacks		Skirts	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $4.00	30.3	11.5	18.5	6.4
$4.00 - $7.99	38.1	32.1	38.5	27.5
$8.00 - $11.99	17.5	25.0	21.5	25.1
$12.00 & over	14.1	31.4	21.5	41.0

Source: NPD Research.

BUYING HABITS

Girls' Wear

Distribution of Purchases of Girls' Dresses & Suits by Price Point, 1980

	Dresses		Suits	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $8.00	36.5	17.0	29.1	12.0
$8.00 - $11.99	28.1	24.7	28.0	12.0
$12.00 - $17.99	22.3	28.4	27.5	29.8
$18.00 & over	13.1	30.0	15.5	34.9

Source: NPD Research.

Distribution of Purchases of Girls' Outerwear by Price Point, 1980

	Jackets		All Weather Coats		All Other Coats	
	Units	Dollars	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $15.00	57.6	31.9	29.8	9.8	17.2	5.0
$15.00 - $24.99	24.8	30.2	23.0	17.2	26.5	17.7
$25.00 - $34.99	10.8	19.5	23.0	26.1	23.5	22.5
$25.00 & over	6.9	18.3	24.2	46.2	32.9	55.0

Source: NPD Research.

To measure the widespread apparel purchasing taking place during August and September by or for teenage girls preparing to go back to school, Seventeen Magazine conducted a mail survey in September 1980 among members of several of their Consumer Panels.

Returns were tabulated from 2,533 teenagers currently attending high school or college, and weighted to conform to Census Bureau population counts. Seventeen Magazine reports that findings are representative of 9,176,000 teenage-female students who spent $6,781,759,000 in preparation for going back to school in the fall of 1980.

(continued)

BUYING HABITS

Girls' Wear

Distribution of Reported Expenditures by Category

	(Thousands)	% of Total
Total	$6,781,759.0	100.0%
Outerwear (coats, jackets, suits, dresses, skirts, shirts/blouses, tops, sweaters, pants)	3,792,002.0	55.9
Footwear	825,125.0	12.2
Innerwear (hosiery, foundations, bras, lingerie, sleepwear/loungewear)	588,277.0	8.7
Accessories	585,182.0	8.6
Miscellaneous	991,173.0	14.6

Type of Store Where Wearing Apparel Is Usually Purchased
(Number of Teenage Girls in Thousands)

	Dresses	Suits/Coats	Sportswear	Sleepwear
Department stores	5,462	5,606	5,381	6,489
Boutique/specialty store	3,612	2,884	3,228	1,285
Discount store	585	575	1,018	1,083
Variety store	543	460	706	619
Mail order	235	146	337	381
Other	270	278	313	301
No answer	134	255	122	223
	*	*	*	*

*Adds to more than total because of multiple mentions.

Departments Girls Usually Shop in for Sportswear
(Percent of Total Girls)

Total	100.0%
Junior department	50.0
Misses department	6.4
Both junior and misses	37.8
Other	5.2
No answer	0.5
Shop in Junior Department (thousands of girls)	8,462
Shop in Misses Department (thousands of girls)	4,263

(continued)

BUYING HABITS

Girls' Wear

Size of Dress Last Purchased

Size	Percent of Purchases
Junior size	72 4%
Misses size	18.8
No answer	8.8
Total	100.0
Distribution by size:	
Junior size	
3	5.7
5	22.6
7	29.1
9	25.3
11	12.4
13	4.2
15 or larger	0.6
Size	
Misses size	
4 - 8	33.2
10	25.3
12	22.2
14	11.7
16	3.8
18 or larger	2.7

Importance of Various Factors in Purchasing Wearing Apparel
(Percent of Total Girls Responding)

	Important	Neutral	Unimportant	No Answer
Style	87.8%	10.0%	1.1%	1.0%
Comfort	86.4	10.7	1.6	1.3
Size	86.2	8.9	4.0	0.9
Color	82.7	15.1	1.1	1.0
Fashionable	81.0	15.1	2.5	1.4
Price	66.6	25.9	6.5	1.0
Durable	59.6	33.1	5.4	2.0
Feminine	55.2	34.0	8.9	1.9
Fabric	52.1	36.4	9.1	2.4
Easy to care for	43.8	41.3	12.6	2.2
Label name	25.5	35.4	37.1	1.9

Source: Seventeen's Back-To-School Study, (September 1981).

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS) (May): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS (June): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR, AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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